

Views of Manitoba School Trustees About Policy and  
Policymaking  
in Education - Volume II (Interview Transcripts)

by

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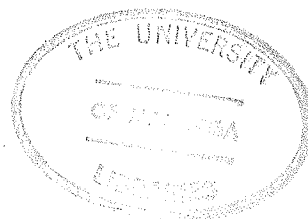
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Kenneth Francis Woodley

## ABSTRACT

The following pages are transcripts of each of the interviews that took place during the course of this study. Considerable difficulty exists when trying to translate onto paper conversations between individuals. Although these transcripts are accurate representations of the words exchanged, it was impossible to show such things as intonation, duration of pauses, voice inflection, volume and other indicators of peoples' feelings.

It will be noted that the transcripts make no attempt at editorializing any of the conversations that took place. Although this increases the difficulty for the reader, it will be easier if he or she keeps in mind that these pages were live conversations and never meant as literary works.

References in Volume I are given in the form X.Y. These numbers are used to facilitate the reader's reference to this volume. In this type of notation, X represents the transcript number and Y represents the page number within that transcript.



TRANSCRIPT # 1

I: Could you tell me just generally what is policy?

R: I would say that policy is a broad outline of the way a board would like to see a certain aspect dealt with - guidelines more or less within which the administration that you've hired can then go ahead and implement any types of programs etc. that may be wanted in the division by the board.

I: Could you give me some examples?

R: Well, one that comes to mind that's quite frequently - a matter - is transportation policy . A transportation policy - we didn't have one on the books when I first came on the board. We've since established one in which we've established what types of students will be transported and - if they're beyond a certain distance from school - and what criteria will be acceptable to the board for transportation. So that type of a policy - the transportation policy - has been established by the board, and then it's up to the administration then to make sure that it's implemented according to policy.

I: Ok. How is policy different from goals, objectives or desires?

R: Well, I guess goals are sort of more global - more general - generally policies are developed to meet a specific need - in my mind at least. I think that transportation policies, policies on expelling students, policies on corporal punishment etc. - so that policies are more specific in my mind than general goals and objectives - and they deal with a specific issue.

I: Why do you hold this particular view of what policy is?

R: I guess it sort of evolved being a school board member. Prior to that I had never thought in terms of who are the policy makers and who are the "doers" sort of thing. When most trustees - at least when I was elected to the board, I found it very difficult to see my role as being a policy maker, rather than getting into the nitty-gritty and getting it done the way I wanted it done. But, it has - I do see the merit - going into the sixth year now of this way of operating in terms of the school board and the school division generally.

I: When you say you've had difficulty seeing your role as a policy maker, what do you feel caused that difficulty?

R: Just because you've - in my own instance anyway - I'd never been involved at that level on the board. I'd been on a board of directors of a nursery school, but actually we were a founding board and therefore, as well as setting policy, we did all the work. You know, one of those types of co-operatives. And, I tend to be a - myself - a "doer". You know, I like to do things and get them done. So I found it difficult - you know, that you could argue for three months, establishing policy and then that's where your role more or less ended. Other than, of course, monitoring that in fact it was being followed. So I guess that was a difficulty for me - not getting involved in the actual implementation.

I: You mentioned that your view of policy changed from the time that you became a trustee. Can you tell me perhaps why and how you changed?

R: One - experience and discussions with other trustees, both at a board level and at various MAST functions. The Manitoba Association of School Trustees - they also hold a number of seminars that you can attend that - and they generally talk very - at great length - usually about policy - whenever you're dealing with any specific - it always comes back to policy. Also we subscribe in our school division to a manuscript from the States from the National School Board Association on policy and I get that

monthly at my home. That also was certainly - it gives you an idea of what's policy related.

I: Does your view of the nature of policy affect your approach to policymaking?

R: Yes, I think so. I tend to see that if policy is too broad that there is too much room still for things not to done the way - for instance the board or myself would like them done. So in policymaking I would tend to be - I tend to be quite specific so that there's no room for very much interpretation.

I: Do you find this may be a little bit of a conflict of an earlier statement in which you mentioned policy as guideline? Do you find that there is a fine line there? Do you have problems with that? Does this present problems to trustees generally?

R: Yeah, I think there is. Sometimes it's difficult to know perhaps when a policy may be hamstringing - may be too specific in terms of being able to be implemented by the administrative staff. On the other hand, I find that a lot of the conflict that can sometimes arise between - say the chief administrators and the board or even between the board members themselves - but say if it's too wide open and it's open to interpretation - so to me you save a lot of time if you make it as specific as possible. And, most

policies tend to have a loophole anyway in terms of special cases. There's always room for the administration to come to the board and say "This would be outside of policy, but we feel that in the best interests of everybody, it would be appropriate that we go beyond or break the policy." And that door is always open.

I: Do you think that policy is necessary?

R: Yes.

I: Ok, can you give me any particular reason why?

R: Well, I guess first of all, from the school board member's point of view, if you don't have policies, particularly on those issues that frequently arise, you're constantly making decisions in emotional situations where there are people requiring transportation (if we go back to that), or asking for transportation, or whatever. You tend then to make decisions that you may regret later or that maybe aren't fair in light of what's been done in the past with other people. So I feel that policy is one way of ensuring that people are treated justly and equal - more or less. As well, I think it's extremely important for the employees - especially your administrators - so that they know what direction the board wants to go in any particular area. If they don't even have that feeling - if the board hasn't discussed it among themselves and come up with some

sort of statement or guideline, I think it's very difficult for them to be placed in a situation making decisions that are perhaps beyond their responsibility - and where they in some cases may end up getting flak for it.

I: Has your opinion changed in this regard, and if so how and why?

R: In regards to the necessity of policy?

I: Yes.

R: Well, again, being on the school board has been an educational experience for me so when I was first on the - the first year or two on the school board, I became familiar with the whole idea of policy and policymaking. However, I would say that I don't think - I think that once I realized that policy was a way - I'm very firm on treating people equally - so once I realized that policy is the best way to ensure that this happens I think that I became a firmer believer in it.

I: Ok. Does your opinion about the necessity of policy affect your approach to policymaking?

R: Well yeah, I'm willing to spend time doing it - which you'll find is difficult to find on the school board. And sometimes you're making decisions that rightfully maybe should be - you shouldn't be making them at the

time, until you've got policy. Policymaking in the school board is a time consuming process and there's many, many areas in which there isn't policy. As I said, there was no transportation policy in our school division five years ago.

I: Once you make a policy, what happens? Is it written down?

R: Uh-huh.

I: Should policies be written down?

R: Yes.

I: Always?

R: Yes.

I: Alright, why?

R: Well, first of all, if it's not written down, you know, it's only in somebody's head. And then it's immediately open to interpretation at any time that you want to use it. Secondly, I think that for new administrators or the public or new school board members it makes things much clearer. Nobody has any faith in somebody saying "I remember last year when we said this."

I: The question of interpretation - could that not still arise even with the written format?

R: Yes, but it's less of a problem - as long as it's been worded properly. That's why we have to spend a lot of time on it.

I: If policy should be written down, how should it be organized?

R: In a policy manual. A manual that's coded for easy reference so that school board members and administration can easily find what they're looking for. There's a number of ways to set it up. Ours is set up - was set up by our administration under a coding system.

I: Who makes school division policy?

R: The school board - often on recommendations from the administration and often from suggestions of the ultimate people who make it - the school board members.

I: But you're suggesting that there are other people who have an input?

R: Oh yeah.

I: Who might they be?

R: Well, depending on what your policy is on, it could be any number of people. You, of course, rely on your chief executive officers - your superintendent and her staff or his staff, and the same with the secretary-treasurer. I



believe that whoever is being affected by policy should have at least some input into it - at least give feedback before it is final. So if it is setting a transportation policy, I feel that you give the people concerned - which is the parents - and if you're setting policy in regards to teachers I think that you should involve the teachers. However - they can get a representative or two - it's up to them. So whoever is being affected by it at least should have some input - so you should hear from them.

I: I'm just wondering if you could clarify how much input these individuals should have?

R: Yeah. Well, what I like to know is like - how is this going to affect people? Ok, what types of things do we have to consider when we're making it? Ultimately the decision is still the school board's and it may in fact not be to the complete liking of whoever is being affected by it. But, at least I think you need to know that prior to doing it - and you need to know how it's going to affect people and if your decision - still the wisest one seems to be that which may turn off some teachers but is better for the students - well, at least you know.

I: What's the role of the individual trustee in the policymaking process?

R: Simply one of your board members who votes for or against and makes motions forming policy. You don't have any policymaking rights on your own. You only have the power when you're a member of the school board.

I: Right. Now, taking it to yourself then, so you see your role as being strictly that of voting for or against?

R: Or suggesting.

I: Another input then?

R: Right. And if I feel strongly enough I'll - you know - get lots of material and talk to the trustees. You know, try and persuade people to my point of view.

I: Can you give me some examples of policies that have been made through the input of people concerned?

R: Ok. In the transportation policy we held - I think - a series of three meetings. These were widely publicized through our community - that we would be trying to form a transportation policy - and we asked any groups who wanted to make input to appear on one of those nights, or else send in written material. So that's one time when we involved the public - in the transportation policy. And of course, we also heard from our transportation supervisor and our teachers - our principals who had special programs

at their school - that they felt would benefit from transportation. So we had a whole range of - that's one example.

I: In that particular instance, the example that you're giving, in your own mind, you had to make as board, the decision about it - which input would you have felt to carry the most weight, and how would you arrive at that?

R: In that particular instance?

I: Well, it doesn't have to be case specific, but how would you arrive at which input should be the most valuable?

R: I guess on who's going to be most directly affected. In this case it was the parents of the students - or the students actually but the parents making the decisions for them.

I: This may sound similar, but has your view of who makes policy changed from when you were a beginning trustee?

R: No.

I: Does the viewpoint that you hold about who makes policy affect the way in which you approach policy-making?

R: Yes. Like I tend to be one that feels very strongly about having input from the people who are affected. My feeling is that some trustees don't feel that way - as strongly - ok? It's easier to make a policy if you don't have to worry about everybody - you know - if you're making it from a strictly financial point of view, you know, you wouldn't transport anybody.

I: How are policies made? By that I mean what processes or procedures are involved in making a policy?

R: I think that first of all there has to be agreement at the school board level, and that often is brought to the attention of the board by senior administrators - that there is an area in which we need policy, because it's becoming just too difficult for them to make day to day decisions or - the school board members themselves are questioning the types of decisions that have been made. So once you have agreement that we need policy, and I think you have to gather all the facts in terms of different situations that have occurred in any particular area - and then, as I feel strongly about - you contact people who will be directly affected by it - hear from them, and then after that, put down on paper, at least a draft and - hopefully the board can approve it - approve the policy. Often it's done with a notice of motion - I think that's preferable because then that gives two weeks notice to people and they

can come and make a last ditch effort if they want. They know what's coming in the agenda two weeks hence and therefore can bring up further points if they want to, before it's finally passed. Then, the one other thing that most of us are remiss about, is once you do have the policy, it's in written form, it's in the policy manual - being used by the school board and everybody associated with the school division and who are making decisions in that area - is that it should still be reviewed. That is one area that - if you want to review every year, every two years or whatever - it seems that perhaps - if you're using it frequently it gets reviewed quite often just informally because if it's not working you're going to change it. But there's some of them that - if it's not drawn to your attention - it could sit for five or ten years and occasionally cause a problem for somebody - but not a big problem - in fact it's never been used and times change and things change - so I think that there should be built in some mechanism of review.

I: Just a point of clarification - you say that you identify a need or a problem and that you gather the facts, contact the people for feedback, and then come up with a draft policy. I don't want to put words into your mouth. Am I right in hearing what you're saying to be that between contacting the people for feedback and the draft, that you evaluate the information that you have at your disposal first?

R: Yeah. And in fact you'll find in that period, of course, school board members - are the people who are going to have to make the policies - are already thinking in their own minds what way the thing should go - you know - but they don't have anything down on paper as yet. Individual trustees would probably, depending on how interested they are, be gathering up information themselves or recalling past instances where what had happened...

I: What things influence how policy is made?

R: Well first of all I guess how knowledgeable with the whole procedure the school board are - and if they are willing to put in the time that's required. I think it's an area that's really been stressed in trustee development, but it's still an area that needs a lot of improvement. I've heard the statement many times that - the less you have down on paper the better you are - from school board members. Because, you know, you don't get nailed with past practices and precedent and the whole business. You can make decisions that seem appropriate at the time but maybe in the long run they're not - but they're the easiest ones. So I think that that ... What affects it is that what you asked?

I: Yes. What influences how policy is made?

R: So, the attitude of the school board members and of the administration of the school division definitely affects it.

I: You talked to me earlier about policy being revised - how do you know when a policy needs to be made or revised? Is there some signpost that you can say "Ah, we need a policy!" or "Ah, this has to be revised!"?

R: Ok, it's usually when you get into a situation where you can see if you make a decision that there are long term ramifications, and that it's going to be necessary to treat people fairly. That's the way I see it anyway - I guess maybe I'm zeroing in on the policies that affect the public or say our employees more so than some of the other policies that can be made. That generally - I guess - brings to the attention of the school board that we need a long term sort of thing to weigh these questions against these individual questions. And the same with revisions in terms of if it's just not working the way you had hoped, or if it's causing problems somewhere else and it needs revision - obviously. If you're breaking your policy every second week it's not a good policy.

I: How have you arrived at these conclusions about the policymaking process?

R: I guess basically through experience - and from the readings that are available to trustees.

I: Does your viewpoint about how policy is made affect your approach to policymaking?

R: Oh yeah, I'm sure it does.

I: Do you ever think of how?

R: How it is made - ok - affect my approach to policymaking...

I: Your understanding of the policymaking process, and how it comes about and how it is actually formed, does that affect the way you approach policymaking?

R: I'm sure it does. As I said earlier, in terms of - I think that we should have to talk to people who are going to be affected. I believe very strongly in policy. I don't like - some people being - because the school board is in a good mood one night - you know, saying it's fine, and then the next night because - all of a sudden you realize how much it costs changing - you know - the next person who comes they say no. That type of thing I think is extremely unfair - so that's why I'm a firm believer in policy and I'll spend time doing it.

I: What are the attributes or elements of a good policy?



R: Well, I believe that it's quite specific to the particular area of concern that it's addressing. And I think that it should try and address all of the ramifications that might evolve from it - from that specific situation. And I think that it has to be clear that the administration who are implementing it do in fact have the right and obligation to come back to the school board, if there are areas outside of the policy that - or things happening because of the policy that maybe are not in the best interests of children or whoever the policy is affecting.

I: So basically what you are saying is that a policy that is encompassing in terms of solving a problem is a good policy?

R: Uh-huh.

I: Are there any other attributes ?

R: Specific though - so that it's not wide open to interpretation.

I: Why do you say that?

R: Just to reduce the hassles that are involved. If it's specific and not open to interpretation, it's easier for your administration and for your school board to follow it and to - not to get into situations where they are being blamed for breaking it or for - the school board is being accused of treating people unfairly.

I: Is this a conclusion that you've arrived at again through experience?

R: Uh-huh.

I: Can you give me some examples of good policies?

R: Specific?

I: Yeah, a specific example of a good policy that brings in these attributes that you're talking about.

R: Well, our transportation policy is specific - now. It was done with input from the community. It didn't meet all of their requests but it went part way. They're generally happy - the people who are being transported are generally happy. The people who don't have children being transported aren't. They feel they are being billed. It achieves what the educators wanted to achieve in terms of kids being near to special programs. So it's quite specific, and it prioritizes - if you run into problems with money or lack of buses - it prioritizes - from the high priority in transportation to the lesser. You know, if you get into not enough buses, hopefully it will go from the bottom up in terms of reducing the transportation. So it's quite specific and it deals with the long term in terms of that and ... generally is very easy I think, for our administrators to implement ... and easy for... We also do have

in there the special cases clause so that if we get requests as we always do - in terms of dire economic necessity, we can deal with them and not break our policy.

I: Again, your view of the attributes of good policy, does that affect your approach to policymaking?

R: Why I want to see them in there. I want it to be specific.

I: How do you evaluate policy?

R: I guess by how well it works. If it's meeting the need that you originally sought - and if it isn't, you change it.

I: Are there any other ways?

R: In terms of its fairness, I guess, to the people being affected by it. If it turns out in fact that it is not meeting that requirement that I have - that's how I feel - then I would think that it has to be changed to in fact be fair - as fair as possible.

I: That's still an evaluation through the implementation though. Are there any other ways?

R: Well, you can compare it to other school divisions' policies - things that you can read from the States again and whatever.

I: What constitutes a bad or a poor or a weak policy?

R: One that doesn't really give you any guidance in terms of making decisions. Or one that's unfair to one segment that's affected by it.

I: This may be hard to answer, but can you give me any examples of a bad policy?

R: I'm sure we've had some bad policies, I just can't think of any ... A poor policy is one that is ... in people's minds - or some people's minds - as what we've done in the past and therefore this is the way it should be now. And perhaps that trustee was the only one who was on the school board fifteen years ago when that decision was made. It's not down on paper - it may be in motion from fifteen years ago - minutes. To me, that's a very poor way to make decisions - on a motion that was made fifteen years ago - and really no policy established and no rationale attached as to why that was done at that particular time. Yet, that often still happens. Those instances are brought forth as reasons to make a decision today.

I: How have you come to hold this point of view?

R: I guess from sitting on a school board primarily, and having it happen. You know, to me being a new member five or six years ago, and not understanding

rationale for - why for instance these kids from a particular area are bussed from kindergarten to grade twelve while nobody else in the school division is.

I: Does your viewpoint about what constitutes bad policy affect your approach to policymaking?

R: Yes. I try to make it good.

I: Do you try to do away with those?

R: Right, right.

I: Have you had any particular experiences as a trustee which have shaped your views about policy? If you have, could you maybe describe some of these?

R: Ok, one area where we just formed policy last year evolved because of a request - We had requests from two teachers - one a teacher and one a principal, both whose sons were playing on a team - it was a good hockey team travelling to Vancouver. They both requested time off to go. And it was beyond the three days that can be approved by the superintendent, so it had to come to the school board. Now the principal had requested that it be with pay. The teacher had not made that request. So, we wanted to treat them both fairly - they're both in the same teacher's agreement, although one is an administrator - I wanted to treat them fairly. So what we decided was that we would



dock both of them substitute costs and let them take the leave, if they would pay for the substitute costs. Now, we didn't have a policy and so that was the decision we made. And of course, the next week we found out the ramifications of it in terms of - first of all, after all the extra time he puts in at the school division, that we wouldn't give him his days off with pay. We had also stipulated the substitute costs at level 4 or class IV, and this was partially an error on our administrator's part. She didn't know what class the teacher was in. She was in class II, so she would be taking money out of her pocket to pay a class IV teacher to substitute for her. So you see, we got into a real bind. At that point then we realized - ok, this isn't going to be a one time situation - we asked our administrator to bring forth a policy that would be fair to all our employees - but not to go overboard in terms of us paying for people to go to Vancouver essentially. So anyway, a policy came forth - Leaves Associated With Length of Service - which then treated both these individuals fairly. A month later we got another request for a leave and the teacher involved was only the second year in the division, so it actually worked out better. We did have a policy that we could refer to and it seemed - and that policy was formally approved by the teachers' association executive, and they felt that it was a very fair policy. I think our guideline was five years in the division before we would pay. And so when the teacher

of two years applied it was fairly easy for us to say "We don't pay" - and you know, the teacher's association felt that that was fair. Does that answer the question?

I: Yeah ...

R: What was the question?

I: I'm just asking if you've had any experiences which have shaped your views about policy.

R: Ok. In the first instance it was a very poor decision on our behalf. We really didn't take into account all the ramifications.

I: So I assume from that, it caused you to think about the effects of your policy.

R: That's right.

I: This research is concerned with - and I can tell you a bit more about it now because I didn't want to lead you in your answers - but this research is concerned with how trustees think about policy and policymaking. Now I feel that the way trustees think about policy and policymaking might be influential in determining the kinds of policy statements that are made. I just wonder how you feel about that?

R: Uh-huh, I think so. But you have to recall, you're talking to individual trustees and they have no power. The only time they have power is as one set of seven or nine you know - and how they can affect a majority on the board in terms of policymaking.

I: First of all, do you think that this kind of research is worthwhile?

R: From who's point of view?

R: Well, from the point of view of contributing say to the understanding of policy and policymaking for trustees in the province - not from my own personal - it's obviously worthwhile from my perspective. Will this be a contribution?

I: I would think so, if it's definitive and if it gets back to the school board members. I find so much research and whatever tends to be too high above the heads of the educational majority of the trustees. You've got to remember that you've got 50 boards or 52 boards in the province, and many of the members do not have what you would call a good education. So, when we start talking about reliability and statistics and all this it is not something they'd pick up and read. If it's dealing with examples of good and bad and what not, or even draws together different trustee reactions to policymaking and gets them thinking -



but it's written in a way that it's easily readable by the average reader, then it will be useful.

I: Do you feel that the questions that you've answered are suitable for gathering the kind of information I'm looking for?

R: I would think so. I think that you will still be left with interpretation - you know - as I did state, I'll go into specifics to explain - and you will still have to interpret that into a broader statement.

I: A final question then: Is there anything that you would like to add which you feel is important to this study and which has not been covered?

R: I think that it might be to your advantage to look at - the board are the policymakers. I think most board members would agree with that - but they rely quite heavily on their senior administration in terms of writing it up and covering all angles - because they're dealing on a day to day basis with implementing it, and they can see all of the ramifications - often much better than the school board - so that it might be worth your while - if you wanted to dig into the whole area - to talk to some superintendents - a cross section of superintendents - to get their view of policy.

I: Ok, well ... Thank-you very much. I appreciate your time and effort and also your candidness.

TRANSCRIPT # 2

I: To your mind, what is policy?

R: That's a good general question. I think it's - by policy I understand basically the general orientation and direction in which you'd like to see the school division functioning, as opposed to say ... such mundane matters as - which often times have to be attended to anyway - as deciding the form of report cards, for example, which I view as really an administrative function

Now I think that the line between policy and administrative functions is fairly blurred in a lot of - from what I've seen anyways - in a lot of school divisions, and indeed, in some respects - some aspects of it cannot be - cannot really be clearly defined. I think that there are overlaps in certain places - especially in such matters as for example when you're addressing the budget ... where I think, obviously as a matter of general total budget ... it's got to be considered a matter of policy. When you start getting down into some of the items of the various precise points in the budget, you know, you almost invariably cross over away from a policy decision into really what may be an administrative function.

I: Can you give me some examples of things that would be purely policy?

R: Well, I think that a purely - that a policy decision - under our system - the obvious one that comes to mind because of what occurred last year, has got to be whether or not you'd close a school for example ... school or schools. In our system, clearly that is the jurisdiction of the board and trustees. And, indeed, it's something that the administrators don't want to address. In fact, they have a vested interest in the "status quo". So obviously I'm not denying that most of them - may - whether they're aware of that or not - most of them are not really prepared to rock the boat to any great extent or degree. I think, and I don't want to digress - I want to let you get through your questions - but I really think that the MAST survey - and I don't think that you were involved with that - shows that relatively clearly. The thing that was played up in the paper was the fact that trustees have a low opinion of themselves. It appeared to me that, given all the results in totality, that they may have a lot clearer reading of what's going on than a lot of other people in the system - particularly when you question - when you look at the question "Are you really responding to the needs of the child?" - I mean trustees were the ones who ranked this as the lowest. I think that that's probably a lot closer to the mark than your superintendent or other administrators.

I: How is policy different from goals or objectives or desires? You were talking earlier about general orientation.

R: Yeah, well that's part of it. I think that in the broad sense that's true. But I also think that it's true in specifics. It depends on where you want to go in terms of either programs - Like I can - I have - I've never really addressed as you are - I've never really taken the approach of trying to layout the theory of this, although when matters come to board, I've never had any real difficulty other than the example I gave you in the budget, of being able to say in my own mind "I think this is really administrative, or this is really policy." Although, even on that standard, I would have to confess that we dealt with a lot of matters which are not policy. Ok? Just because of the way that the system feeds them up to you. But in the smaller examples - our policies for example - you might have a good - you can illustrate that if you take something that's educational like "immersion" for example - where you've got the provincial guidelines but which - well it's always called immersion - it's fairly different in terms in which it's treated from one school division to the next - like whether you've got 80% English or - French as opposed to English or whether it's 62% or so on. Those are really considered in our system, policy matters which are determined - are at the discretion of the board really.

I: Do you have any particular reasons why you hold this particular view of policy ... what it is? Is that a developmental thing? Is that a ...

R: I had that attitude going in if that's what you're asking. It was relatively clear to me, prior to the election, that part of the difficulty in our school division was the fact that the board especially was - you know, more interested in whether or not they would be having Chinese food, or sandwiches at the next meeting over dinner - as opposed to asking themselves where the school division was going.

I: Does your view of the nature of policy then affect your approach to policymaking?

R: I think it does.

I: In any particular way?

R: Well I think that there's a lot of things that I'm only beginning to realize. I think that one of the points I was raising earlier - and the reason that I can make that statement is I was - in the short time that I've been a school trustee (over two years) was a period where there was a superintendent - then we had no superintendent - and now we have a superintendent again - so I can make these comparisons. I really think that the whole system which feeds the board through the superintendent is really geared

in many ways to getting you - as a board I say you - but getting the board not to address policy. I think that a superintendent or a system often times - and I'm speaking in generalities - but are more comfortable asking you something which really they should come up at - if they don't decide it, they should at least come up with a recommendation, as opposed to passing the buck until it hits the school board. Now, I think the way in which it's addressed - it's affected my conduct because I've made a concerted effort whenever I thought it was a matter that I thought it was a matter that should be dealt with on the administrative level, to say "You should handle this. It's an administrative matter." And if you don't get away with that - if there's no consensus on that on the board, then saying "Come up with a recommendation or report so we can look at it and take some enlightened - like give us the background or whatever." That's my view - I've found as recently as the last meeting that other trustees were more comfortable discussing how the plumbers should be putting in shut-off valves in a certain school where there was a flood - you know, when they replaced the piping. I can't - I must confess I really can't get into that.

I: Do you think that policy is really necessary?

R: You should ask if I think that school boards are necessary. I have some question on that in my mind ...

Uh, given the North American context, because school boards are really - as we know them in Canada - are really particular, I think, to North America - I guess I'd have to answer the question in the positive and say it's a good thing - we need some kinda political policymaking body and school boards are it. I really think that they should concentrate on that, rather than on other things.

I: Why is policy necessary in this context then?

R: It's because of the - it's because of your basic - you know - it's the system. You could devise a better system, thinking about it I think - in an abstract sort of way, but it is the system that we have in effect. Whenever you look at the Public Schools Act, it presumes that you've got this school board operating as a policy-making body and you have no choice but to answer that in the affirmative. I mean if you didn't want to have it that way, you'd have to re-structure our whole educational system. And if you didn't do it in Manitoba alone, which would be dangerous given the fact that it's a federation - you'd have to - you'd really have to get every, or at least a majority of the provinces I guess similar things at a similar time. It would be a pretty massive undertaking.

I: Can you give me any specific examples of where policy is absolutely necessary?



R: I think at the introduction of courses or programs - in our system - is a good example. There's a lot of new courses that are introduced. I think that one of the problems is that they somehow seem to come to us for permission to start new ones, but I don't see them coming forth too often with requests to cut some of them out. I'd like to think that at some point you get rid of these things too if they're no longer really fulfilling a need. I think that's one example. I think that school closures is another one. I think - in our system, obviously the level of services - because of the fact that you have to set the budget - and in that sense the budget is a policy making tool. Like - you know - whether or not you're going to have supervisors of programs in a school division - I mean that's a - some have them and some don't. And if you do have them, which courses are they going to supervise? Are you going to have a supervisor of music, phys.ed., geography or whatever - or are you going to concentrate instead on Core French you know and drop the phys.ed. or whatever? That's where these judgement calls are involved. So obviously in that sense the size of the - the same thing with introduction of even I would see of material things, for instance your overhead projectors or - there's a discretion by school principals but - certainly the amount of money a board is prepared to spend for example on computers is a current example. In our system it's really - especially in light of just complete

absence of guidelines by the province - got to be a local and policy matter.

I: You're saying that given our current system that we need to have policy ... Is this opinion about the necessity of policy, is that changed over time, since you've become trustee? Or has it been the same?

R: I guess it's changed to a certain ... like I had, and in that sense I don't perceive myself as being a typical school trustee - and I had a very cynical view of things before I embarked on this, and probably most of what's happened has just kind of confirmed my cynicism, but, there have been a few - I guess they've converted me on a few points to seeing or recognizing the validity of the procedures that have been established - and part of that of course, has been to - at least in terms of lip-service, have a board that sets policy - whatever the hell that is. Everyone doesn't have the same perception of policy unfortunately - we're all just using the same word but it's like the Russians and the Americans talking about "detente".

I: This opinion about the necessity of policy, does that affect your approach to policymaking then?

R: Well only as I was saying a while ago - that I make a conscientious effort at trying to address those matters, while recognizing that in certain other instances

you have to play by the rules of the game, such as they are, and with the people that you have in place which kind of forces you at times to go beyond that somewhat. It's alright to say that you've got to just address policy, but at one point, even if you give them a - what I find - if you just give them a general thrust, a lot of times getting the administrative implementation is just about impossible. So you have to go a little bit beyond that and spell it out in some detail. It's not just a matter of principle - like - you know - for example, what I was not involved in - we should have "immersion" or introduce "immersion" in our school division. You just don't cross back your arms and wait for them to implement "immersion". It won't occur that way. The same way when you say that there are simply too many schools in this school division because the number of - we only have half the students that we had five years ago - they're not going to go out and close schools for you. You've got to get into the nuts and bolts of the matter. So, I don't know if I'm fully responding to your question Ken, but ...

I: Yeah, that's fine. I wonder- policies that are made, are they in your case written down, and should they be, and ...

R: We have a policy manual which contains, you know, most of the - supposed to contain most of the policies

in the school division. It's been - we've made a conscientious effort at cleaning it up - in a sense of updating it - a lot of the policies had not been looked at or reviewed since the establishment of the policy manual, which I believe went back to early 1977 - which meant that a lot of times the policies and the practices were not the same. There was an administrative practice that had evolved in another direction (often times for very good reason), and often times improperly so, so they have got to be brought back to heel. I haven't counted the pages recently, but I would imagine that we've done more than half of that policy manual in the last two years, and indeed, we've even probably taken all of the more contentious issues and revised them already. So I think there's been a conscientious effort there at a) reviewing the policies, b) seeing if they were the ones that we require - they're still fulfilling the needs, and when we thought we didn't need them, we just knocked them out completely, c) communicating those changes, and indeed the policies themselves to the right people in the school division, and then d) trying to ensure that they hear of the policy - and if they can't, we want to know why. There's been a very conscientious effort at doing that and getting these things out. Where we've fallen down a little bit is to go beyond that. We've made some attempts at that, but that has not really been addressed by anybody. I'm a proponent of that - going beyond that and getting the poli-

cies known to the public at large - not only even parents, but just in the school division. That is a lot more difficult task, obviously.

I: You've talked about written and formalized policies, I wonder, are there any policies that are not written down, that are not formalized as such but are still, in fact, policies that are in place?

R: I think that there are some.

I: Do you deem that as desirable, or undesirable, or ...

R: Well I think it leads to ambiguities, in fact it leads to some misunderstandings. Maybe the most glaring example - certainly in our school division where we have basically four parallel programs - completely parallel from K to 12 - there's not another, at least to my knowledge, division in Manitoba that has four separate programs on a K to 12 basis. The difficulty is that while these programs are very well known and identified, and people relate to them - and we have policies that say that we endorse and have endorsed a program "School Concepts" - so we have a program that stands alone within one building - ok, as opposed to dual tracking or whatever - that's another - that's a clear policy and that's in writing. Surprisingly enough, what we don't have is admission criteria to these

various programs. This is controlled basically by the admitting school principal. There's been several attempts to get at that, and nobody really wants to address that issue because it's too dicy politically. So, I think that what that illustrates is that you can have some fairly important points which should be covered by policy that are not - for political reasons. And certainly, secondly, there are misunderstandings - can you imagine when you're a parent and you come to a school - the public school system - your school division - and you're told by a school principal that your child cannot register in this school, and yet the school principal has no written authority - I mean it's a purely discretionary matter on his part. It's a pretty fundamental question just by way of example. There are others.

I: Ok. Who makes school division policy?

R: Well, I guess I'd like to say that it's the board, but I don't really believe that that's completely true. I think that it's, you know, a little bit like the appointment of judges - that it's a process where officially and nominally it's the board that is doing it. But in reality, I think that it's a process - certainly the informal process - a little bit in the same way as conventions have evolved in constitutional law - has a tremendous amount of input from your top administrators - certainly

school principals and your superintendent's office. I think there's no question they influence it a lot. I think teachers influence it but, when they are not personally involved, to a lesser extent. I think that the school principals, even though technically they're teachers and they're part of MTS have got a broader overview of things. I think that's how they influence policy or try to anyway. How they do that is of some interest - self interest at least. And then I think that students - unfortunately I think influence even less than teachers and here there's a decreasing scale of influence. If either the teachers or the students perceive that the policy is not in their best interests - invariably what you see is the public outcry - where the parents get involved - and I think that that can have lot stronger impact on the direction of the policy or the decision that is made, but that it's not a constant input. Like the school principal, the administrators and the teachers have got constant input that may vary somewhat, but parents sometimes have got no input at all. If it's not considered a contentious issue, they don't care. There is no input from them at all. But I do think that all of these groups have input in the policymaking process. Whether you want to or not - even if a board tried to eliminate that, they would just come down as a delegation.

I: Well, how much input should these groups have?

R: Well, I think that it would be nice to be able to say that maybe they should be formalized somehow - either in the act or whatever. But if you look at the - I don't know if that's a part of your interests - if you look at what happened to the City of Winnipeg in your revision there, and the whole concept of resident advisory committee, that seems to have been a bit of a flop. I think that we can say that now that it's been there for some twelve years. So, in that sense, this informal process may be a lot more effective than it might - kind of ask yourself "How come this works? How is it that this can work?" But, in fact it does. I'm not at all an advocate of limiting the amount input that we would receive from any one of these groups. I'm quite prepared to hear them out - fully - almost "ad nauseum" - but in the end, still quite prepared to take the decision if it means that none of them are really getting what they wanted.

I: But you do feel that their input is a part of it?

R: Absolutely.

I: What's the role then of the individual trustee in the policymaking process?

R: I think he has a very limited role, believe it or not, because of the fact that a trustee really has no



standing at all, other than as a member of the board. An individual trustee can't really ask for the boards or - recommendations and - really is just an ordinary citizen, although very much aware and - he knows that he's going to be involved, but he has no particular special standing as some others have in ... You might argue that that's true as well in other political offices - if you looked at MP's or MLA's then - they have a different status - but they have offices - they have a secretary - they have almost like a separate function - where really absent from the school trustee or ... members that I have met - even in other divisions - with a few exceptions - the exceptions being school trustees who almost spend a lot of time - I was going to say who live down - but who spend a lot of time down in board offices, almost as volunteer workers. They would have greater input. But, the trustees' individual input has got to be that you've got to try to keep abreast of all of these issues and, indeed, to bring forward the issues and matters which you feel are not being addressed in the school division. That's how I perceive my role.

I: Ok. Back to the previous question, I was wondering where you're talking about these groups of people influencing - can you give an example of a specific policy, for instance, that has been formulated by input from a variety of people?

R: Well, the obvious one in XXXXXXXXXXXXXXX is the closing of schools. There what happened - and the process was a little bit of a flop - through no fault of the board - we sent out - we established - well basically I should say like to a large extent the minister's guidelines on school closures - I would say like 85 or 90 of that basically is in keeping with what occurred in XXXXXXXXXXXXXXX. We wanted the people to know about it; we talked about it; we funded and created the resident advisory committee to get a report; in schools where they didn't have a PTA, we asked them to set one up; we met with their executives, and whenever they needed resources, put a secretary almost full time at their - and you know, central office which was just pumping reports out for them and doing their typing, keeping minutes of their meetings - so I mean, there's a good example of where the public or parents had input. Where that process fell down, in that particular instance, - we asked the school principals for input - for recommendations, and we asked the teachers for input and recommendations. We got a reply from the school principals saying that this was a policy matter - that we should assume our responsibilities and take whatever decision we had to. And the teachers sent us a letter saying that they - indeed a copy of a resolution - endorsing the school principals' stand. So you kind of - then you know you're on your own. Nobody wanted to touch it - so, there's a concrete example of where they were asked to

participate - yet in the end once a decision was made, if they didn't like it, they really hollered.

I: This view that you hold about who makes policy, has that changed since your election to the board? Is that the view with which you came to the board? Has it altered ...

R: I think it's altered obviously. Only a fool would maintain the same positions but ... the one thing that surprised me, I guess in terms of my - and that answers one of your earlier questions and probably in greater detail - but still the influence, or how one individual elected as a trustee can change the face of the map, so to speak, and relatively quickly. Like I really did not think that it was possible - I've always been aware politically of what one person can do - that's why in none democratic countries they get rid of a lot of people on a regular basis - especially when they're relatively young - it's the only way you can really keep people in check. I really did not think that a situation could be turned around that quickly. But, ours may be an exception rather than a rule. It's a relatively small board - only five people - and I would really favor increasing the size of the board at least to seven anyway - but anyway, there is only five, so the minute you have three, that's your majority. And what happens is that you just have three very strong individualistic sort of people

that came together from completely different backgrounds and decided that a problem had to be addressed, and then decided to move on that and that constituted a majority. But, I'm not sure that that is typical. It would not happen if you had a larger board, and I think that it's very rare to find individuals that are that different, that are that individualistic and also that honest to an analysis - like to be able to take the kind of political flak that we took - like most people would not be prepared to do that. They would just duck it. When you've got 750 people in a room, stomping their feet and yelling that you should resign, you have to ask yourself if you're right or not.

I: This viewpoint that you hold about how policy is made, does that affect how you approach the policymaking process?

R: Well I think it does. I thought I'd answered that earlier. I make a conscientious attempt at distinguishing between every matter - everything that comes up on the agenda. And if I really think that - and some of them are hybrids - some are not one or the other, but certainly I try to distinguish them and try to see to it that - you know, as a board we don't get involved - we don't stray too far away from the policymaking process - keeping in mind that there are some things that are statutory - that you can't avoid. And also, trying to see that the administra-

tion does basically what it gets paid to do... which is to administer and take certain run of the mill decisions.

I: I wonder if you can clarify for me how policies are made - that is to say what processes or procedures transpire from beginning to end?

R: In our board, the way it works, generally speaking, - ok, I have to back you up. I have to give you a bigger view of what we're doing. What we started doing - and I established this as an approach when I was chairman of the board - we basically had two - this is all in public meeting I might add. This is none of the "in-camera" stuff that's done over coffee. This is done with the public present - two free-wheeling sessions as a "committee of the whole" right after the election. Every trustee who had a concern just put them out on the table and we just gave it a title. It didn't matter. We didn't worry about whether it was policy or not policy. Then we kind of tried to lay them out in terms of priorities... Then we developed a timeline for these things. So everybody knew, basically, you know - we kept to the timeline until we came to the closing of schools, and then we got bogged down - I have to admit that - but up until that point we basically addressed these issues in accordance with our timeline. So people knew, especially on the later ones, they'd known for a year and a half that we were going to address such and such a

question in such and such a month. And the administration was given directions to come up with the report or any comments that they had on existing policies when we got to it. Anybody who had a particular - vested interest or whatever in that, kind of somehow fed into the system before it got to the ward. They had a lot of advanced notice that the question would be addressed and reviewed. I don't think that there's - with one or two very minor examples which are not really that important - that generally speaking anyone who was affected by it or who would have an interest did manage to be heard - either came down as a delegation or wrote a letter - whatever - did something appropriate in order to make their point of view known. So we would do anyway, is when the policy then is put on the agenda, very much of a free-wheeling discussion on the thing. If we find that there is not enough information, or if there are some questions that have not been answered, it's sent back, but there, with a view to getting it on the agenda the next meeting so we can deal with it. Generally speaking, I would say that after two to even three meetings, the more contentious policies - generally speaking - there's a new one that's been drafted and it's adopted, and that's basically it. And it's circulated. But there's been a lot of - in our particular school division - I don't know if I can comment on any other school division - I've attended meetings - I don't know how common this is, but we have question

and answer period even for people who turn up at the meeting. So that you are getting the immediate feedback from them even as you're going along in this whole process. There are a lot of times even a teacher or a school principal stand up and do that as well.

I: I think you've answered part of this before, but what things influence how policy is made?

R: Certainly any of the representations that are made in whatever form influences it. I'm not certain that - again ours may not be typical - but, I'd like to think that it's really the question that it's addressed, and that even if you had ten people pushing a board to do one thing, and one pushing you only to do the right thing, that the right thing would be done. But I'm not naive enough to think that's the way it always works. There's no question as well, I think, that we have as part of our political process, a lot of compromise. There's always a lot of give and take in order to - you don't really create a concensus, but in order to have a decision or a policy that will be respected - a lot of these things are - certainly in our school division I guess, not a matter of black and white - not a matter of right and wrong. It's a kind of all grey, and the longer you talk about it sometimes the greyer it gets - so you barely know really what is proper. But you do know that you've got to put an end to the debate or discuss-

sion, or they need some guidance. This always makes it difficult.

I: How do you know when a policy needs to be made, or needs to be revised?

R: Well, in our case it needs to be revised if there's a problem when they come up with it. If it's because of the policy that you've just - someone will ask - almost invariably one of the members of the board will ask if the policy is wrong. The one thing we've tried to do in our board is we try not to make exceptions to policy. It's a concerted effort - in fact you can count on one hand - in fact I can only think of two in two years of exceptions - one a minute thing - giving a kid a bus pass that he's not entitled to on so-called "compassionate" grounds when it's not the kid himself that's sick, it's his sister who has leukemia, so he's going to accompany his sister. Like that's an exception to our bussing policy - that kind of thing - which is good because it at least shows that the system can still respond to an individual's needs. But there's still a conscientious effort not to make any exceptions, at least, that rather than make exceptions to vary the policy so that it does respond.

I: So basically when you have a problem ...



R: When we have a problem, we're either going to suspend the policy, make an exception or amend the policy - that what I'm saying is in our case, I can only think of twice - one I just gave you and the other would be very similar - say fine here's an exception for you. The only reason that we had the other one was that you just could not find a way in a policy - to structure your policy in such a way that the superintendent's discretion would be so wide as to grant that kid a bus pass - because if you gave him that wide of a discretion it becomes a loophole in your entire policy and it defeats the whole purpose really.

I: Again, how have you arrived at these conclusions about policymaking -  
the process?

R: The school of hard knocks I guess - experience.

I: Experience.

R: And I might add, there's pretty strong push by MAST when trustees are newly elected to try to make this point - to try to convince them that this is how they should conduct themselves as school trustees. I'm not certain that MAST succeeds all that much in that aspect of what it's doing, although I support their work and I agree with most of what they're doing. The fact of the matter is a lot of

the people - individual school trustees are a lot more comfortable with very concrete - very small - I was talking about the size of the pipes there in the school when there was the flood and the plumbing had gone - and I'm not just being facetious - I mean that they cut out sections of the pipe and they're down there in the board office - you know, and some people can really relate to that. Well me, they tell me that there was a flood. We've got to repair it, there's nothing much to debate - send your request to Public Schools Finance, but whether you get it or not, put out the tenders and do the work because you've got no choice. One way or the other you've got to change the piping system. You know steel pipes are going to go and you've got to put in copper after 18 or 20 years. To me that's a ten second item. The only reason it's got to come is that you haven't budgeted for it. Now I swear, I think the debate over this lasted some twenty minutes. Some trustees can really relate to those pipes - whether you want to put shut-offs in or tell the plumber to do this or do that - you know - what can I tell you?

I: Well, knowing how policy is made, and the way you've described it, that again, does that affect your approach to making policy?

R: I think I'm probably - well I'm very much aware of these distinctions and I try to maintain them all

the time - I'm probably a little bit more tolerant of letting what I perceive to be non-policy matters be debated at board, hoping that it will be over with quickly, you know - bringing it up, deal with it and get rid of it - rather than making a big deal about the fact that you shouldn't be dealing with it.

I: You try to satisfy...

R: The other members of the board because otherwise you get into a big debate about whether you should be addressing this or not, and that's probably good for twenty minutes or half an hour. And you can deal with the matter in five minutes, so you become a little bit more practical I think.

I: In your mind, what are the attributes or elements of a good policy?

R: I think that the first thing - is it has to have a real purpose. You have to be addressing a real issue or ... I don't want to use the word problem, but it's got to be serving some need. If it's not addressing a need, I mean why would you have it laid out as a policy? I know that sounds a little bit like a funny point but you'd be amazed at the number of so called policies that we've just eliminated because nobody knew why we had that down there. The second thing I think that - once it's been addressed as a

pure matter of policy - in other words, once you know the general direction in which you want to go in that issue - I think that it has to be stated clearly. Now that may appear to be obvious to you. I would suggest that the policies that are the least clear in terms of their drafting are those that have been negotiated with teachers or the MTS. You could probably say it in four lines and it takes two pages. I think that there's the whole matter of being able to communicate it.

I: That presents an interpretation problem then I gather?

R: Oh yeah, I mean who's going to read two pages? Especially single spaced. Right? I mean it's just all kind of a blur when you try to look at it. I mean it's one thing for me to look at it because I do that day in and day out as you can see from the condition of my desk. I'm basically in many respects a professional reader - it's part of what I have to do, indeed, drafter and so on. It's all part of - it comes with the training. But I mean to really expect bus drivers and caretakers and even teachers and school principals and children to read things which are patently difficult to read is unrealistic. So I think that's a very small point but I think that it has a lot greater impact on whether or not that policy is going to be observed or not. If they don't even get to read it and don't know what it is

... I mean you're dead before you start. We've had situations where a page and a half has been reduced to I swear maybe five or six lines.

I: Are there any other elements of good policy that come to mind?

R: Yeah, ok. The real test of a good policy is whether or not it's observed, but that's down the road ... I really - If you had that - I mean if you had a policy that addressed a real issue and if it was clearly drafted and communicated to people in the school division, and possibly even the public - in as much as the parents are involved in it - I think you'd have it beat basically.

I: How have you arrived at this conclusion about what good policy is?

R: I think just as a result of the process that we've been through - as I explained to you, the time table that we had and the priorities we set on the various issues etc.

I: Maybe you can give me one example of what you deem to be a really good policy by your criteria?

R: You want an outstanding one when you use the word good, is that what you're after?

I: No, I'm after one that meets your requirements. You've just said that there are two things - two fundamental elements of a good policy - so maybe you can give me an example of a policy that meets those two ...

R: I think a good one which is a prominent one and possibly not - you'd be familiar with that because it's common in the rural areas, but not that common in the urban centres - is policy that we have with respect to community use of our buildings. I think we reviewed that policy four or five times including committee - that's the whole thing - since we got there - which has really nailed down because it's a very difficult thing to communicate because you're trying to communicate it to the public at large, and yet it's being administered by your principals, basically, and by people in central office. There you have to - there's all kinds of people that are going to be using that building and of course - or schools because that's what you're dealing with. And of course the rules change so that in our case if it's a school division activity that's one thing, but if it's a community thing locally from the school division, that's another. And if it's outside the school division it's treated in a different way, and yet if there are any liquor permits involved, then they don't have access to all of the buildings which they used to - but only four high schools, one in each area of the school division, and you've got to fit in there. So you've got a lot of these distinc-

tions that have to be drawn about whether it's a non-profit organization, and really community activity, or if it relates to education and so on. Yet that policy has been successfully worked with and it had to be re-done three or four times because it was just diverse. But yet, since it was almost a year now, there haven't been any real complaints or anything. As I say it's not just a simple point - like drive on the right hand side of the road - a very complex matter, and they've got to fill out the forms and the whole bit. And they have to all perceive themselves as being treated fairly and equitably by the school division. And I think that one works.

I: Ok. Thank-you. Again, your view of what constitutes a good policy, does that affect your approach to policy?

R: Oh I think it does because I endeavor to a) ask myself why do we need this policy, b) what's the problem we're trying to solve here, what's the issue, and c) I'm very much aware of then trying to get it drafted as shortly and simply and clearly as possible. So I think it does affect my approach.

I: How do you evaluate policy? I'm pre-supposing that one does.

R: We really evaluate them, in our case, it's an ongoing process but really as a result of these - it's a review that we're doing on the one hand and any other problems that happen to come up - if a person writes a letter to the superintendent and a copy to the trustee, or if a delegation comes forward, or whatever - or if there's some kind of a request for an exception or whatever - any one of these things are basically seized upon by the board to see if our current policy such as it is, meets the need, so to speak. I think it's done that way. And what I would say is that in our case it's done on an operational basis - the only really structured thing that we have in place to evaluate policy is the fact that we just decided that we would go through the whole policy manual on a three year term which basically forced us to go through them all from a to z. We will achieve that ok? But the rest of them on the ongoing way - it's simply on the basis of what's going on in the school division.

I: Further to that, do you perceive that as how it should be evaluated?

R: Well it's not bad, but you know if every school board in Manitoba in every one of its terms reviewed every policy in the school division at least once, surely to God that would be an improvement over the present system that we have, and indeed, the one that we had in XXXXXXXXXXXX



where they hadn't even looked at the ruddy things since about 1977. It had been sitting there for four years with nothing really happening and few people bothering to read it any more.

I: How about bad policy? What constitutes a bad policy?

R: Well, bad policy is one which you don't need - it's kind of innocuous on that basis. The ones that are really dangerous are ones which basically were there some time ago, were not reviewed, forgotten about, and are being used a lot of times without the board's knowledge by people down in the ranks - usually administrators or whatever to fend off requests that they don't want to have to deal with - and especially a lot of times if that is the direction in which the board would like to go, that they're using one of these policies that's been forgotten about - the XYZ policy over on page such and such here to say no all the time. Another more concrete example of that was - maybe I can illustrate that for you - in our system when we had the policy for the use of buildings by - for our facilities by the community - well basically it was a school principal who would decide if a person qualified - well it was unbelievable - you had some school principals who had the schools full all the time, yet others who would never do it unless they were getting some kind of compensation - not rent for

themselves, but certainly some money in for the school - like a fund-raising project - a source of income for the school - an additional tax on our taxpayers. And then others yet who, it didn't matter what you asked for - like everything was busy so they'd never have to be bothered with it eh? The way to get rid of all that - which you can do in an urban centre is - you centralize that decision making process so that - basically it's spread around... Now that policy was bad only - it was the right policy but it was falling down in its application because the mechanism that was being used to implement it was such that it was like self-defeating. To my way of thinking that was a bad policy. And you have to watch it when you're a school trustee because it's almost like - I don't want to describe to you - I don't want to sound paranoid or describe some kind of a conspiracy theory - but there's a very strong system out there between the teaching staff and the administrators and all that, which they can almost defeat any stated policy just in the implementation of that. And if you're not careful it can be even contained right within the policy itself. I think those have got to be the worst ones.

I: Ok. Have you had any particular experiences as a trustee which have served to really shape your views about policy and policymaking?

R: I think - you're talking of course as a school trustee - the thing that - and I tend to forget about it - the thing that probably marked me the most would have been my participation in this selection process for a superintendent. What we did in that instance - which I think you need the background to understand it - I succeeded in convincing everyone that everyone should have input - well first of all that we should go from a dual system to a chief executive officer - there's a policy - a principle, now you go ahead and do it - secondly, that we would have the superintendent that we would hire basically implement that change in policy, but then in the hiring process that we have to have input from everyone. So we ended up with a committee where there were two school trustees, one parent, - I forget how we got her appointed exactly -, one school principal, and the president of MTS. Before we started hiring and advertising, we went through a whole process of what we wanted, defined it and worked at it and got our questionnaires worked out - we were really well prepared - in fact I think Roy White is using that as the basis for one of MAST's pamphlets or something. But, what happened there was, that as a result of that, it really forced in the interviewing process with these people who wanted to be superintendent, to address this whole question of what is policy, and what is in policy and how do you perceive your role because you've got to be certain that the perceptions are the same

on both sides. I really think that is what this whole process of selecting superintendent and all these interviews probably resulted in my - on the one hand understanding the administrator's problem - just the reverse side of it - you know - that's influenced me to a large, large extent.

I: This research that I'm doing is concerned with how trustees think about policy and policymaking. My feeling is that the way that trustees think about policy and policymaking could be influential in determining the complexion of policy statements - the types of policy statements that arise. I just wonder how you feel about that.

R: What's your hypothesis again?

I: Well, that the way trustees think about policy and policymaking will definitely influence the types of statements of policy that are derived from a board.

R: I don't think that that's completely true. I think that that is you know - I reject that on the basis of the individual member - I think where it's true it's the - that perception by the board - by the majority of the board will I think make your statement true. I assume it's on that basis that you're making that statement. There's no question because I've seen that - there's no question that the unfortunately almost constant majority on our board has had a very clear reading of what is policy or not and how

they wish to proceed - and I think it is being reflected in the policies that are being adopted and being implemented. You see that's the other interesting thing about this policy - this is my hypothesis - that if a board does this properly - what I'm talking about - it's very tough for even a subsequent board to unravel, unless you want to just wipe out all the policies in one shot. You know - because it's just too massive a task. And a lot of boards don't have the staying power to review all policies from a to z. So I mean someone who goes in there and does the job properly - you've basically set the course there for at least three subsequent years and maybe even more than that - depending on what others do subsequently - it sets the tone.

I: Ok. Do you think that this kind of research that I'm doing is worthwhile?

R: Yeah, I'm very interested in your whole approach. I didn't fully understand. Maybe if I reread your letter I would - talking to you on the phone I didn't - but it does say that. The questions have helped me. Obviously they clear up in my mind what it is that you're doing. I think that it's very interesting, and I think that this is probably the kind of - this is not why you're doing it - the kind of discussion that you and I had today is probably conducive to clearing a lot of these matters up for the individual school trustee. In other words, if we sent

Ken Woodley around talking to each one of the trustees in Manitoba with the same interview, that would probably have a greater impact on the decisions that will be made until the next election - because I think it would have to be done every time - than these seminars or whatever that MAST has been holding. But I think that - obviously it's a one to one ratio - a pretty massive task. I think a lot of them - they might even go to the seminars and are told that, but they always think that they're doing things right and MAST is talking about someone else.

I: Well, the kinds of questions that I've asked you, do you feel that they're appropriate for gathering the kind of information that I'm looking to find?

R: Yeah. I don't know how you're going to compile it - I've got some difficulty with that as opposed to the kind of - what's become the run of the mill thing of answering questionnaires in writing or whatever.

I: The trend now is of course back to the sociological "soft" methodology of content analysis and that kind of thing...

R: Yeah, but you still have to turn around afterwards and convert this into some kind of data that you can work with.

I: That's true. Is there anything that you'd like to add that you might

feel is important to the study and which hasn't been already covered?

R: Well, you see the way I look at it - which is a little bit like I said, I have some views on it - it's a question that's not really being addressed - it's probably inappropriate for your study as well - but it's whether or not - you had that question originally - I said that given the system we had no choice but I mean the fundamental question is "Is this really the best way to ensure the delivery of educational services to our children?" In other words, "Do you really need school boards?" is another way of putting it ... and that's a lot more fundamental question - it's one that most school trustees aren't even prepared to consider. They're just thoroughly convinced that this is the best way and the only way ... If you look around - if you look at Europe, look at Japan - you have to ask yourself - it's obvious - it can't be true - they don't have school boards in Japan and they're educating, supposedly even better than we are, although we know that apparently, as well, that the total population have got a higher I.Q. on average by some sixteen points than we have in North America. But, - that's too profound a question, and I don't really think that - even if you came up with the consensus

in Manitoba - as between school trustees, that you shouldn't even have school boards - that policymaking should take some other form - I don't think that you could effect that kind of a change in isolation. I don't think it's possible. I don't think it's politically viable in the first place anyhow - The province wouldn't do it, the public wouldn't put up for it because they'd think that they were losing and so on. So this thing will probably wash out in the end. They're going to probably - hypothetically, but in terms of what I see coming, looking down the road - they're going to do it anyway. The way they're going to do it is by consolidating the school divisions again. The same thing as what happened in 1959, because a lot of the process has been undone in practice - especially in the last seven or eight years - we've seen a return in a lot of villages that - introducing a high school one grade at a time - hiring one teacher with eight students in grade eight and building it one year at a time which I really think is doing the students a disservice - it's being done by boards operating usually with a ward system and where trustees perceive the money paid to the teacher as being an economic contribution to the local community that has to be done that way. They're not really primarily looking at education. I think where the head knocking is going to come in is going to be on the base of declining enrollment. In fact the base is not there, and also the introduction of the communication



that the computer technology that will enable - especially in rural areas - to have communications over wide distances, quickly and in writing, without having to put a person in a car and have you travel a hundred and fifty miles round trip to either deliver or - you know, a policy that you want implemented. But that's going to be down the road, but that's going to de-personalize this whole thing - bigger school divisions - as much as it would I suggest if you wiped out the boards and turned it over to the provincial government - the Department of Education. People wouldn't want that anyway either so ... I don't know, other than the fact that the system is evolving, and other than the fact that the system is - you know, I think that systems, almost by definition are bound to be - you know, they may be a necessary evil. So, I don't know ... I think your questionnaire's actually fairly good - in fact it's - you've got the usual checks I saw built in of asking a similar question in two or three forms and being able to compare the answers. I just hope that I've been consistent since you've got me taped.

I: Well thank-you very much, I appreciate the time...

R: I enjoyed the questions as well.

I: Good.

TRANSCRIPT #3

I: Can you tell me in your own mind, what is policy?

R: Policy is that function of the board that deals with the many conditions, the many circumstances that arise in the business of a school division. It's basically a sort of regulated, written down way - after some decision, some discussion - for the board to deal with propositions that arise, that are common or uncommon. They're not all inclusive - they don't include everything, but certainly, if an emergency arises that causes us some administrative concern we consider what has happened to us so that in the event of another occurrence of that nature we will be prepared - if in fact we haven't been prepared to date. So that while it's not all encompassing, I don't think - it's not intended to be all encompassing, but certainly it's meant to be a working formula for the board to do regular things at times when it's requested to do something that has to do with how we deal with public or how we deal with employees or how we deal with situations that have to do with accident or things of that nature.

I: Can you give me some examples of a policy that fits your criteria?

R: Alright. Even in the regulation of the expenditures that trustees can make. We can't go out and wantonly spend public money. We have to decide what it is that we are involved with, how will we fund this, what will be the entitlement of an individual trustee, to what length can we go in expending money for the purpose of self education or involvement with other school divisions or with other larger conventions or meetings where we glean some information from others and listen to professionals speak on the subject of dealing with children in education - The formulation of that kind of a policy takes time, and after some years we change it because we recognize some weaknesses, we recognize some underexpenditures or some overexpenditures, or some pressing need to change the amounts that are given. The recent - for instance - high exchange between the American and Canadian dollar caused us to look at it because of the very great expenses attendant to using money in another place. All these things are sort of - prompt us to make policy and that's an indication of one of them - not the most important, but certainly one.

I: Ok. How's policy different from goals or objectives or desires?

R: Well, long range goals are different in the sense that policy is an "ad hoc" decision after discussion that pertains to something that might press the board once in a year or twice in a year or something while as long range policy is something we intend to do - for instance build five schools over a period of ten years to fill elementary needs. That would be long term policy - it would be our committment. It would have nothing to do with setting policy in relation to how those schools might operate. You see, those are divisions.

I: I'm wondering - you're talking about goals and objectives and desires - essentially you're saying that they're incorporated into policy then?

R: They might reflect the longer range desires and objectives but certainly they're not necessarily the long range policy. Policy is a regulating forum of discussion and decision - something that gives us a parameter - we know what we can do with a condition that prevails or will occur the next time, you see?

I: Why do you hold this particular view of policy?

R: Well, from experience. I think that policy shouldn't be so hide bound so that it can't be changed. I don't think the policy should be negative - I don't want to

say that policy says you can't do this - policy should evolve because you can do something within limits, and then if there's a need to change it because of misuse or desire to protect a larger question or to deal with a larger question, then policy should be changed. So it's not written in stone - it's a guide - it's a working guide - and that's how I feel about policy.

I: And you say that this has come about ...

R: By experience - it's my experience anyway.

I: Ok, the way you view policy, what it is, does that affect how you approach policymaking then?

R: Certainly the circumstances that bring the policy - bring the policy into being are different. You know - I just got this out to give you an indication of the different compartments of policy in a board - and these have been built for a long time since I've been on the board, and changed many times - some sections more than others. Some sections remain because they're sufficient for the conditions that prevail and the times that you use them. Others have changed often - a bus accident might cause you to change the regulation of your buses - what drivers will do when they're on the buses. One man might use a bus to pull another bus which is against the school's act - against the regulations - he may not have understood - so that will make

us look at the policy on accidents to see how we can strengthen the wording and explain better the intentions of the board, and outline the act once again so that anybody looking at it will have less trouble - less opportunity to misuse or to misread the intentions of the policy.

I: Do you think policy is necessary?

R: Yeah. A board that has no policy is just flotsam - it has no direction - it would destroy itself - it would meet itself coming around corners all the time making wrong decisions - somebody will pressure in one direction so you'll make that decision only to find that you can't do that because ... so, at least policy gives you direction and it's a guideline.

I: So policy gives you direction then?

R: Yeah, I think so. It's not only with your experience that you gain now, but somebody else has also had some experience before you came. So it's a - as long as you keep bringing it forward and change it according to today's current needs - or you know, or anticipated needs for tomorrow, you stay - you have a working manual - an operative manual - and that's what policy is. And it's the board's prerogative to do that.

I: Can you think of an example, for instance, of where the necessity of policy has been obvious?

R: Well, the accident would be one example - delegations, for instance. At one time delegations had to give so many hours notice before the meeting and indicate the purpose of their presence, who would be the spokesman, and things like that - it was kind of structured. Myself I didn't mind that. I thought it gave some order to the presence of the delegation. The board in its wisdom, after a while, changed that last year for instance, or maybe two years ago. It changed how delegations would come. We now let them come almost on an hour's notice, so long as they make their business known, they can sign in, they can be given a hearing, and of course all of the deliberations that we do in regards to the delegations are done in "Committee of the Whole" so that you don't give an immediate answer to them - although we question them on their delegation, and we want to know what their intention is, and why are they saying this and that, and board members certainly take the opportunity to freely question delegations. Well delegations that was structured, now are less structured and have occurred perhaps more frequently because of the change - but I don't think it has truly because we've had swarms of delegations and then it stops for a long time and then when people are unhappy they come again, so - that would be one example. You have to understand why people are coming in, you have to know what to do with them, and you have to have something that says to you "Ok, it's a normal thing to

listen to the public" - you know, you don't want to keep them out - "This is how we listen to them", and then we set policy for it and we apply it.

I: Has your opinion changed in this regard - about the necessity of policy?

R: Well, in fact when I wasn't a school board member and I was busy with the home and school, I used to think that delegations were normal because that's where I used to go if I wanted to be heard about - particularly things that I thought were happening in the school and some changes that I - for instance, libraries. The first time I ever appeared before a board was because I wanted to find out what kind of a grant they would give us libraries in the elementary school. That was the normal thing to do - go to the board, talk to them, see what they're doing about it, see what they would offer you, see what you could put in place - so I don't think I've changed my mind - procedures might change and I might change with the concept or better procedure - maybe freer access is what citizens need, you know - so you kind of change your mind. You say "Ok, what am I so ...

I: But you've always felt that policy is necessary?



R: Yeah. Oh no, I haven't changed my mind about policy. You change as your experience changes. Like, you might be fearful of some diminishing authority that the board might have. And then when you consider why you're afraid, you think to yourself "Why are you afraid?" What is it that you're guarding - in fact, won't this question grow larger and more - with greater clarity if you allow it to be used or discussed or changed, you see? So I think generally - like I'm not opposed to that. I think that that kind of change makes you grow - it makes you understand something better.

I: I think you're saying - correct me if I'm wrong - but a certain basic tenet of your faith as a board member is in the necessity of policy and that's been...

R: Yeah. And that makes you - it makes you - not only binds you, but it allows you to work - do you follow? Like, you're there as a board member and a board member is only the public. Thirty five hundred people sent me there in my ward. It gives me certainly a right to sit on the board, but it doesn't give me the right to regulate thirty five hundred people. It gives me a right to regulate how the board might operate so - policy is what allows me to let it operate, you see?

I: Ok. Your opinion about the necessity of policy, does that affect the way that you approach policy-making?

R: As I suggested to you, not everything is covered by policy. Some contingent thing, some emergency might make you develop a policy that wasn't there before.

I: You've shown me the policy manual here, and obviously it's written down quite well formulated policies - should policies be written down?

R: Oh yes. In fact, when everybody has reference to the same guidelines, there still will appear some variation in interpretation. But, nevertheless, the base is the same so that you can start off with the same concepts - because after all, they were discussed as board, they were developed as board - now you're an individual member and you're interpreting what you read and you think back on how you argued for or against and your interpretation may have somewhat of a bias, which is not unnatural. Other board members may correct you - remind you of other arguments but written is where you take your basis from. This is the bible, this is what you go from. It's not written in stone, but certainly it's the guideline that you start your argument or your discussions from.

I: Although it's not written in stone, are you advocating that it always be written until such time as it's changed?

R: Yeah. That's right.

I: All policies?

R: Yeah - so that nobody's guessing.

I: Do policies ever exist that aren't written?

R: Yes - there may be practices that the board may have involved itself with, without the need for written policy.

I: Can you think of any examples?

R: Well, I was just trying to give you something that may be valid. Hearing someone without a formal vote - now that's not policy, but you look around the room and there's nine guys nodding their heads or - so ok, let's get this over with - let's hear - so then we'll hear something formally - you know, like it really doesn't have any case in law, but we'll do it because it's an expedient thing to do, it furthers the question, it gives us more information - let's see, how should I say this - there's a delegation in front of you, and the guy that isn't designated to speak has something on his mind, he wants to get it out - well, you know - nobody objects - ok, what do you want John? What have you got on your mind? The guy tells you. It may be a good point, it may not be a good point, but you hear it. Now that didn't have to be heard because you say to yourself "I've got a delegation - that's the spokesman", - you've given them all the leeway the policy says you can give them,

and yet you stretch that point - well, that kind of decision may be something - you might send a card to somebody, you might send somebody flowers for a service that they've done the board - some minor expedient response - that might be an example.

I: You point out that this might not have a place in law. Are you equating policies of the board as sort of the laws of the board?

R: Well, you must understand that policy regulates your actions of the board. And sometimes you violate them. For instance, let's use a basic one - let's go back somewhere here ... These are not violations of sort of criminal intent or anything but - "A chairman being a duly elected member of the board shall have the unrestricted right to vote on all matters before the board. In the event of an even number of votes, the vote is lost, and the chairman, having had the right to vote cannot as chairman break the tie." - Well that's formal, it's understandable, but you know, in the heat of an argument or a discussion the chair might two or three times remove himself from the chair formally and the fourth time not remove himself from the chair while speaking on the issue. That's the kind of thing that might happen. Somebody might call you on it so then you'll excuse yourself and start over and not do it again. But, the breaking of a tie - it may be evident that there's

a deadlock all the way through the discussion until the chairman does speak - and when he does speak, he might have a bias towards it, for or against, or leaving something as the "status quo" - not to change it. Well, actually what he's doing is breaking the tie. Those are kind of little nuances that occur and they're not serious - sometimes they cause a discussion. That might be an example.

I: Who makes school division policy?

R: Boards.

I: And are they the only ones?

R: No. We make our decisions - we make our policies on many factors.... incidences, occurrences, circumstances, pressure from the public, accidents, shortfalls of money, administrative advice, teachers' advice ...

I: These are all influences?

R: Yeah, for many reasons. Think of what people have said to us, or what has happened to us and then suggest to the administration that a policy should be forthcoming - or the administration should warn us and say "You know, this is the second time this month that this has occurred. We believe that we should have something regular - regulated, that we can use to overcome these conditions, or to help these conditions out. And, we will bring back at the next

meeting a policy - an outline of a policy that you may or may not accept or ammend and one that we can use for it. Well, that's what happens. The administrators who are always involved with school particulars, as opposed to a trustee who comes to them as a lay person in the community - and I know you spend four or five evenings there a week which is not uncommon when we're negotiating especially - it still doesn't make me - give me an involvement in total as the administrator does say, or a teacher or a principal within the school. And that's not to say that they have all the experience or all the knowledge, it's just that they know of some of these things that I don't see or hear of unless I'm given the information. So, ...

I: This aids you in policy?

R: Sure. When the board listens to these discussions we might have delegations - one came to us the other day in regards to crossing guards, as an example of what we listen to. Well, the board has on several occasions, visited the community committee and expressed our feelings about lights and crossing guards and stop signs and they've never listened to us anyway. Now a delegation of parents are saying to us that they would like us again to go - so, our policy ultimately - the policy that we'll accept and we'll apply is one of doing the same thing again that we talked about earlier. Now that wasn't a policy that was

written anywhere. It was a policy that - pardon me, a practice and a principle that the board supported. Now it becomes an item again because the public wants it. Now I don't know if something will develop from that in policy that will say that we will supply crossing guards or we will make regular delegations to the city council and tell them that we want to do A, and C in regards to traffic. I don't know if that will ever develop that way. But in fact, what we're doing is formulating an opinion, getting support from the public - we'll get administrative information from our administrators who will sort of accumulate all of the information - the things we've listened to - and that's how the delegation will finally go forward and that might result in another policy.

I: How much input should your administrators, the teachers, the delegations etc. have into policy?

R: In my opinion, they are our total resource. They're everything we hire and everything that represents the public and everything that's current. So, I think they have great value for input and, they certainly have opportunity for input. Without it we'd have an awful dull policy. We'd have a policy that was restricted to nine people sitting around a table who may not have a wider view of anything.

I: So you're advocating very few limits, if any, on the input?

R: Yeah. Listen to everybody. There's nothing wrong with the in-gathering of information. In fact, that's the process.

I: What's the role of the individual trustee then, in the policymaking process?

R: You bring your bias - you listen to arguments - you define somebody else's intentions - you express your own opinion - you pick up the different pressure points in the discussion - you might articulate the argument that you've listened to - you have full participation in it's development - anybody who says that they've never developed it and don't have a policy for it - don't have any feelings towards the policy, is not saying something correctly because, unless they developed it in 1942 and you didn't come to the place until 1982, you sure as hell have connection with some policy. It's yours to use, it's yours to talk about, it's yours to ask questions on - it's yours to respond to. So, as far as I'm concerned, policy is an important item where all individual trustees are entitled to express their total opinion. There's nothing restricted in that discussion.



I: Has your view of who makes policy changed from when you were a beginning trustee?

R: Well ... yes, I think it has.

I: In what way?

R: Well, when you come on as a new trustee, you're really green. It doesn't matter how well intentioned you are, or how you are intelligent, or academically trained, or how much experience you bring with you. You have a tendency to believe - you naively accept policy - like administrative information. I don't want to make this sound as if administrators lie to you - I don't mean that - but a filter system keeps you from understanding - like until your own understanding develops to a point where you understand - truly understand the processes - you're restricted and in fact, attempt to sort of accept some statements intact. Like you question them, but you don't question them too much. But it doesn't take long before you dissect and separate some of the things that are being said in a statement. Once you start questioning, then you're on the road to understanding better. And it doesn't mean that what has been offered you is bad, it means that until you develop your own resources - with what you've learned, and experienced, and what is being said to you, and the whole environment that you're in - you really don't make policy. You participate, but you're really not doing that. And it

takes you some months before you start to hear and understand the process. So I think that way, I've changed my mind - I've come away from...

I: You're more knowledgeable now?

R: Yeah. I don't mean to distrust anybody, but I want to understand what he's saying - it's what I do at work. I'm an analyst. If a guy tells me he needs two, I ask him "Why do you need any?" So, similarly, in the statements you listen to, you kind of chew them up in your mind and then ask your questions, and then finally you may agree or disagree or want to alter, or take a different tack. That's what most trustees, I think, do. Whether they do it the same as I describe or not, I'm not sure.

I: Ok. Again, does the viewpoint that you hold about who makes policies, does that affect your approach to policymaking?

R: No. I hold that the board is responsible for its policies - as I suggested to you, I hope that people will bring you information or tell you about things that need to be changed and with my understanding of their argument - and consideration at the board level, that policy may change. It may remain the same. I may be opposed to what I hear. On the other hand I have to consider what is said in the light of how we deal with these questions.

I: Now, how are policies made? And by that I mean what are processes and procedures that are involved - what are steps involved in the formation of a policy?

R: Ok. I'll give you the simplest one. The administration wants to make some changes in the delivery of curriculum, for instance. This not only affects our policy, but may affect working conditions. So, they have to be careful of what they're saying to us in relation to how they deliver it - and the administrators will consider all the different aspects of their intention, and will suggest to us that a policy is required in relation to their intentions as administrators of the school division - which we give them full authority to be - here's what's going to change if we do A, B, or C. We would like to develop a policy in relation to that. And that kind of discussion will come to the board. It may never get off paper. The board may reject it outright. The different philosophies of education prevailing in the board may say "No way, this is contrary to what we want." For instance, if somebody came to us and said they'd rather do away with community use of schools - in our board, you'd probably lose your head because it's been in place since 1969. We've always enjoyed it and experienced it. It costs us a couple of mills every year - people of the community like it - if you close down something people are asking "Why the hell did you close it down?" - we don't make any money on it. It always costs

money. We try to keep it within bounds. We try not to be repetitive. Now, if somebody came to us and wanted to change that policy, I'm sure that that would be a negative thing. It would be thrown away. On the other hand, another year it might be real tight - there might be money conditions in the budget that won't allow it - somebody might place a motion and get it passed saying "Do away with it". And that board might change it's mind and do away with it. But all of those decisions are because of the attention that we give it, when it comes to us through our administration. Teachers might pressure the administration to make some changes say in the way we teach Core Fench. Those are the kinds of examples that I think would be reasonable.

I: Can I recap that? I just wonder - correct me if I'm wrong - I'm interpreting what you're saying to be an intiation by some party, perhaps your administrators, perhaps the public...

R: It might be the board itself that initiates a policy. It says to the administration "You know we've been having - I've got ten people that phoned me about this, and it's getting to be evident that we don't seem to have any understanding of what the public needs, and our requirements haven't been articulated anywhere. We should kind of think about this." And the administration will take it and think about and maybe in a couple of weeks come back and say to us

"We've discovered A, B, and C. D is not valid - you know. From that, a policy will formulate.

I: Ok. So you go through an initiation stage to the discussion?

R: Yeah.

I: To an evaluation often ...

R: Yeah.

I: And then to a decision?

R: Yeah. Yeah.

I: Ok. I just want to make sure I'm understanding you.

R: Ok.

I: How do you know when a policy needs to be made or revised?

R: Some occurrence might change it. To go back to - that's a bad one to use, but it's one that's current in my mind - we've never had a policy on how to give drugs to children, you see? My wife worked in the AAAAAA School Division for thirteen years and she was always familiar with the policy for delivering drugs. And suddenly, one day, we discovered that we didn't have a policy in our division for

delivering drugs, and it arose as a question. Some parent had some question. Some parent asked a principal. Some principal asked the administration. Suddenly, somebody wasn't satisfied with sort of an "ad hoc" development. Now, we've got a policy on how to deal with children who need to take - who have to have drugs administered while they-who'll give it to them - where'll we put the drugs - who will deliver the drugs - how much supplies should we keep on hand - you see?

I: Ok. So essentially you know that a policy needs to be made or revised when something is not being fulfilled. Is this what I'm getting from you?

R: Yeah.

I: When there's a problem that you can't resolve through your normal policies ...

R: Well, to use a very mundane one, and one that hits everybody's pocket - one day, when we added up our bills for parking lots - and you know, every school has a parking lot - we found that we were giving everything away. And so at least, we should have some money there for snow removal and electricity and for wear and tear and for maintenance and all those things - when we got finished calculating, we were some dollars short. So, we upped the ante. Well, immediately we got a hue and cry from the teachers and

from everybody that uses plugs, and that caused us to take a second look and make not such a large increase, but certainly to cover our costs. So that was an indication of where policy was in place - it wasn't adequate - we changed it, not correctly according to some people in the community. And then we formulated a policy that was at least a compromise and acceptable, you see? So that might be another example.

I: Yeah. Again, how have you arrived at the conclusions that you have about the policymaking process? How it's made, how it happens... Is this a thing that you've gleaned from experience again or ...

R: It's how we practise it.

I: Were you aware, say when you came on the board, did you anticipate it to be this way?

R: I think it has changed since I've come on the board also - the way we formulate policy.

I: In what ways?

R: There - I think we're more attuned to the development of policy because of our experiences. You see, on our board, we don't have too many new. The present chairman has been on there a dozen years at least - maybe fourteen years - the past chairman was on there eight years

- ten years - other members have been on there seven years, six years - so like nobody's new. We're all conscious of the particular pressures that people bring to you or - that occurrences lay on you - so we're not prone to make anything sacrosanct. We'll change something. If we figure it's not correct, we'll try to change it. We'll talk about it. We'll see what's the matter with it. And for that reason, it's a policy that's quite alive for us - this book is quite alive for us - we use it every day. So I think that the board - I don't know, maybe I have too - I've changed the way I formulate policy. I've never restricted the flow of information to me to make me change it. I've always been interested in people telling me something about why they're satisfied or dissatisfied. And most people will tell you things when they're dissatisfied. They don't usually tell you if they're satisfied. So, you hear the negatives, but certainly that has information in it.

I: What are the attributes or the elements of a good policy?

R: Something that is thought out. Again, if you're making a policy to be negative, then you've lost the ability to apply it. If it's there to regulate an activity - people won't necessarily resent some regulation, so long as the activity is allowed. The board had a policy, for instance, that said that they didn't want door to door



solicitation by schools infringing on their own sort of catchment areas so that the population was being constantly bombarded and requested for funding for everything from chocolate bars to cookies to empty sacks, you know. At one time there used to be a tremendous overlay of everybody's enthusiastic fund collecting. Now we know that schools thrive on activity, and certainly that's an inherent dynamic of the school. But when you visit yourself upon the same public that pays the taxes, they get kind of pissed off at it - they don't really like that so ... so we carried to say to students that any school generated activity was ok, but any commercial enterprise wasn't ok. Like I don't want to be buying thirty pounds of apples at my door when I really don't want thirty pounds of apples - even though I might want to support the school - if you asked me for a couple of bucks for a ticket to come and see your operetta, by all means I would do that. That's a good thing to invest in. Buy a basketball ticket - even if I don't go to the basketball game, I'll buy the ticket. But don't constantly try to sell me something that I don't want or keep demanding - so that the board tried to regulate a policy that forwarded that concept. We have a policy now that is less restrictive, perhaps, than I would personally like - on the other hand, it's sort of a choice - it gives the students the ability to raise funds without allowing them to make themselves totally nuisances, you know, at every event. So...

I: So that's a good element...

R: Yeah. So, like we didn't say no to the students - you didn't get them really frustrated, but you're telling them to use some guidelines to stay within and try to do it within those kinds of confines. And, by and large, I think their lists are longer now than before, and yet they seem to be regulated. We seem to be, this winter, getting less complaints. They have to formulate these policies way back in October or September, and again in January. If they want to do anything from September to December, they've got to tell us what they're going to do - you know. So those kinds of things make people think of what they're going to do - really - they might add a few items just to sort of fill the sock up a little bit, but sometimes they don't do all the things they say they're gonna do. But it gives them a choice eh?

I: Are there any other attributes besides that one or elements that you think go into making a good policy?

R: Well, a reason for making it - preparation of the information - you know, the refinement of the information - the discussion that refines it ... If you're going to propogate it, it has to make sense, you know. And everybody has to give it some particular thought on how it will be applied. If you can't apply it, there's no use it being on your books. It has to make sense.

I: Ok. On the other hand, what do you think constitutes a bad policy? What are characteristics of a bad policy?

R: A bad policy would be the abolition of something - the disallowance of the use, for instance, - the disallowance of the use of the schools for community purposes. That would be a bad policy. Why would we do it? Taxpayers' money buys the school - what do we want an edifice sitting there closed up twenty-three hours a day for? Why would we want to lock the library on a Sunday? I think that it's a crime not to put your buildings to use. It's not to say that the buildings don't cost you money when you use them. But, if buildings are within the proximity of public, and public wants to use them, and it stays within your reasonable bounds of budget - and you may derive some revenue while these things are being used - why would you say don't use them? Like, we had a counsellor who advocated closing the school yards at night so kids wouldn't break windows. You see that would be a lousy policy. That would be a terrible policy - one that you would have constant trouble with - you never could enforce it properly - I don't know what else to say ...

I: That's fine. How do you evaluate policy?

R: Through it's use. Now, if you have a bad policy - with all good intentions you may make a policy -

and the first time you go to apply it, or the second time you go to apply it, you find that it has weaknesses because, all of a sudden it has no relevance. The first condition that prompted you to make it is not one that re-occurs, and now the conditions are different. You might say "Ok, we've got to change this thing."

I: Ok. So it's really - the evaluation comes through the use of the policy, or the implementation of it?

R: Yes.

I: The view that you hold about what effectively makes or constitutes a good policy, and what really characterizes a bad policy - that view that you hold, does that affect the way you approach policymaking at the board level? And if so, in what way?

R: Well, for instance, I don't like something that restricts me. I work in a highly structured bureaucratic railway and I cut many corners when I'm thwarted one way, I figure "To hell with you Jack, I'll do it the other way." - and I do. The alternative to that is to just do nothing - and sometimes that's very hard - so you do the best you can with the rules that are layed down for whatever reason. I think people are generally the same. If you lay down - if you have a policy that restricts - I don't know - I don't like regulation myself, so when I approach some-

thing, I always try to undo the regulation that surrounds it.

I: You try to make it as liberal as possible?

R: Yeah. The things that frustrate me must certainly frustrate people in the public as well. Although, my understanding should be better because of my involvement over a number of years with a school division making decisions.

I: And again, is this a point of view that you've developed over time?

R: Well, I think I've always felt that way. It's how I feel about things. I don't like regulation, I don't like government, I don't like anything that thwarts me. It doesn't mean that I'd rather be a libertine or an anarchist but - restriction gives you a tendency to want to overcome the restriction. And if that's the case then, that's the way I approach things that are foisted on me. The public tries sometimes to cause you to do something as well, you see. They want you to ban a book, or they want you to enforce this rule, or they want you to - if you examine what they want, they're more autocratic than any board ever is, you see? So, those kind of things bother me as well. I have to tell you truthfully that I don't like people pushing. I like people telling you what the trouble is. I

like people showing you a solution. I like a good discussion about how their conditions affect them - that's a good learning process - but I don't like a delegation coming to me and laying it on my lap so that I have to accept it - because that's nonsense - then why are we elected? - why do we represent a cross-section of the community when a hundred people in the community can really make you do something that's not for the common wealth?

I: Have you had any particular experiences as a trustee which have shaped your view about policy? Anything that you can remember that sort of stands out in your mind and after which you said "Hmm. Now this clarifies things about policy." or "It makes me feel this way about policy."

R: Only that I take with me a degree of skepticism and I keep that in mind. Like I ask why are we doing this, or why do we need this, or who's benefit is the end of this policy? So some questioning attitude - not for any particular reason, but because I know that you can listen to a discussion all evening and not hear the fine point of it - whether it's intentional or whether you're being screened or whether they don't want you to have the total facts, or whether they want to protect a teacher - you know - candidly, like in a private discussion with the administration, with anybody in administration I'll say "Look, what the hell's the score here? Why are we doing this? Why are

we shielding this guy? Why are we shielding this position? What's happened to this?" - And I may get a different answer altogether. In board, they may say it differently, not because they're trying to hide something, but the way that they express themselves is a formal, professional way. In private, I might get different information. They don't owe it to you but on the other hand, they might answer you. See?

I: Ok. This research that I'm doing is really concerned with how trustees think about policy and policy-making - not necessarily the content, but ....

R: Yeah. I think it's important, and in my estimation, it's one of the most important functions that you have to help run the school division that you're representing the public in.

I: Well, my feeling is that the way trustees think about policy and policymaking may well be influential in the...

R: In how the school runs.

I: Well, in the kinds of policy statements that come out. In other words, the way that you feel about policy and policymaking - as an example you've said you don't want policy statements that are restrictive, because you think that policy should allow rather than disallow - my

feeling is that if that's the way you think about policy, that that could have an influence in policy statements that would reflect that.

R: Yeah. My opinion is not by itself strange. There might be guys who don't have the same opinion but occasionally we'll do the same thing. You know, depending on the subject matter - depending on the...

I: Do you think that's a valid premise? - That perhaps not individually as you point out, that if you get two or three of you on the board who feel the same way, that will influence the complexion ....

R: Sure. You could get some - some boards are so highly fractionalized and I would draw your attention not so much to city boards as to rural boards, that you would be amazed at how they want to restrict the use of public funds for the purposes that they believe is the delivery of education, but in fact doesn't deliver anything. You know, it's just in name only that they have this board delivers this - but they hope it never gets expended like - you know. That's an important item. I think that the way trustees think certainly affects policy.

I: Ok, the other question that I have then is do you think that this kind of research is worthwhile?



R: Well, if it gives you information - sure. You see, it's not because boards - our board - we would like to have people ask us questions - we would like to have people phone us - we would like to have people identify themselves and come and have a discussion with me - I'd be glad to spend an hour with anybody if they wanted to know something. I had a call the other day - the guy says "Did you write this?" - and I said "Who's speaking?" - the guy didn't tell me. So I said "Today, I've got a very short fuse. If you really don't want to tell me who you are so that I can explain what you're asking, I don't think I should talk to you. When you want to tell me who you are, I'll be glad to talk to you." I don't often do that. Sometimes I listen to the baloney until it comes out of my ears. But that day, I decided that - you know - our board has quit advertising in the papers saying "Come to our meetings". We've done that recently again, this is an annual report that they put out for instance. They just give you - mostly this is written by administrative and teacher input - it just explains what we are doing with people who are immigrants - welcome to the meeting of the school board. Now we used to advertise this regularly - every week. We got no delegation in a year. Well that wasn't our intention - so, it would be a reasonable thing to have somebody come out and say "I'm here as a citizen. I want to hear something." An old lady from BBBBBBBBBB Avenue came about seven or eight meetings in a

row - quite amazing - sat through all of the open part of the board meeting and went away satisfied. In fact I gave her a ride home a few times because one time she was there to find out what would happen in the committee of the whole which she had to wait for - and then she waits about an hour and a half until we come out of committee - by that time it's about eleven o'clock and I drove her home because she used to live where I used to live on BBBBBBBBBB. Other times, because people are frustrated with something, they'll come in there in droves - rarely - but they'll do that sometimes. Sometimes we'll move a meeting out to a school where you have four hundred people yelling about the same question from fifteen angles like, you know? Our board's intention is to be open, to discuss problems that are brought to us, to understand the changes that are developing in our community from the public, and yet, the public doesn't avail themselves of it. So we're not trying to be secretive although we may be secretive because we have a formal way to attend a board meeting - and when you look at our minutes, the items are itemized, but if you're really not used to it, and you haven't been there last week, you may not understand what the hell the discussion is all about until you've listened for some time - and it might be a short discussion. Somebody might move it immediately and get rid of it and it's an item that's sort of accepted.

I: The questions that I've asked you, do you feel that they're appropriate for the kinds of information ...

R: Well, if your intention is to ultimately define what my attitude is, you might have done it in five questions and I won't change my mind too often. But, you might also send these questions ahead of time so that a person can think about what you're saying and what you need - give you a greater in depth answer. I'm not trying to malign this interview, but on the other hand it might have served you better if you had sent the questions ahead.

I: Is there anything that you'd like to add which you feel is important to this study - to find out how trustees do think about policy and policymaking?

R: I only want to emphasize that I receive my information from a hundred places. At one time I used to know every teacher for instance, in the division - I don't - I can't tell you that I do now because there are more employees - when I came on first there was about three hundred teachers, now there's over four hundred and seventy - and I know many teachers - long time teachers - and we attend teachers' conferences, principals' conferences, sometimes we even have the opportunity to hear particular discussions - we serve on particular committees where we meet teachers - advisory committee, special education, - so you meet your employees on a one to one basis many times -

in negotiations you sure as hell learn about some of them, you know - very frank discussions in negotiations you understand - they're not restricted and we don't try to restrict them. So my understanding, my learning, comes from everybody. If we have a good administration, I sure as hell think that's the best thing we pay for. If we have administrators we pay a lot of money to and they do nothing, that makes me angry as hell because we've got a good resource that isn't being utilized. We hope that there will be an open expression - we're not trying to be personal with anybody, on the other hand, we'd like to know what moves a school division, from different people - an aid will talk to you about it, a librarian will talk to you about it, just privately or personally - or meet you in the shopping center or something of that nature. So your information comes from a hundred people - from public, from teachers and administration, from other trustees, from other trustees in other school divisions - you know, you're always thinking about the process - and that's where I learned from so, hopefully, that's the kind of school division we run. We run an open school division - or we try to run it. We might be accused of not running an open school division you know, but that's somebody else's way of looking at it. I don't know what else to add right at the moment.

I: Ok. Well thank-very much for your time and your help. I appreciate that.

TRANSCRIPT #4

I: The first question is - I wonder if in your own words you can tell me what is policy?

R: It's ... it's a broad statement of a position that the board has taken and which serves then as a guide for employees and administrators in particular to carry out the business affairs of the division. Policy, of course, can cover different policies - a whole gamut of possible areas but primarily, they're a guide for the board, and more particularly, for its administrators to carry out the wishes of the board.

I: Could you maybe give me some examples of policy then?

R: Well the obvious sort of one would be an annual policy position taken by the board at budget time with regard to numbers of professional people we're going to employ in our school division. That's a policy position taken by the board. It then becomes the guideline for the administrators who then must make that work in a system - provide education within that framework. It goes from anything broad like that down to very - almost incidental

things - policies with regards to keys and who has access to school buildings. The board has the policy - rental policies for example - with regards to use of the facilities by the community generally. The board sets out their operating objectives in policy form and then that provides the framework for administrators to carry on the business of the school division.

I: How is policy different from goals, objectives or desires?

R: Policies are more specific. Goals and objectives seem to me - policy ought to be the specific interpretation of the broad goals and objectives, I suppose - if I was to - I'm reacting quickly here, but I would think that that's it - the goals and objectives would be a broad statement of what your organization is trying to accomplish, and the policies then ought to be the instruments whereby this is achieved, and they ought to be consistent with the goals and objectives.

I: Why do you hold this particular view of policy and what policy is?

R: Partly I suppose, because I had some administrative responsibilities, and I recognize the need for policies in order that administrative people in large organizations know what it is they're supposed to be doing.

I: What kind of administrative responsibilities did you have?

R: Assistant superintendent.

I: That could make a bit of a difference then. Yours might not be the standard reactions ...

R: Well, I'm not sure though ... I would hope that most board members although they might not be able to refer their opinions to specific instances of their own experience the way I can, I think, though, that board members are only effective if they see their role as being basically a policy setting role, and not an administrative role which is the big trap for board members to fall into.

I: Earlier you talked about guidelines and then you talked about policy becoming very specific in terms of who has keys and that kind of thing. It sounds to me like there is a very grey area there or perhaps a fine line where you encroach on administrative responsibilities. How do you feel about that? How do you differentiate?

R: Between policy and administrative responsibilities rather than goals and objectives to the policy?

I: Yeah, earlier you had said...

R: Ok, I think any organization can get into difficulty. There's always a possibility of difficulty when

the policies perhaps are not clear enough or, if situations come up that seem to have to be handled in a hurry, and for which there may not be a policy. And I think that those are the areas that administrators generally walk a tightrope - to know when they can take a position which may be somewhat inconsistent with policy or in an area where there is no policy, in order to meet some kind of an emergency - when they can get away with that and when they can't. Sometimes there's almost no way to tell. Sometimes administrators just get in hot water with that occasionally and I don't know how you would always - I don't think that there's ever a way to avoid it for sure. I know specifically, an instance came up in our own board fairly recently - and this was with regard to public access to the school facilities. There was an application which came in which appeared to be under policy. As it turned out, it wasn't because the person who delivered it gave a wrong impression to the administrators who had okayed it. The administrators then called that to our attention. We had a specific board resolution then, saying that that party is not to have the facilities any longer - period. Then the applicant wheeled back around and went through the appropriate organization that they should have gone through to begin with. Women were hollering because their aerobic dancing wasn't going ahead. The administrator tried to avoid getting the board a black eye - proceeded to let the thing go ahead - and then,



of course, there's a ruckus at the board table because some board members had voted clearly that she should not have this facility, so - these are the kinds of situations that occur and that are difficult to handle.

I: Has your view of the nature of policy changed since first becoming a trustee, or is it a carryover from being an administrator?

R: No, I think it's changed some from being a trustee.

I: Can you expand on why and how?

R: I think as an administrator, I used to be stronger on trying to have policies to fit as many possible situations as I could imagine might come up. As a board member, I've become more inclined to see some of the weaknesses of too much policy. I still think it's important but there are inevitably situations that you're - policy is not going to cover - they're going to come up - and sometimes, even, if you try to get too detailed with policy in general - there are going to be specifics come up and your policy is going to often interfere with you doing the sensible thing, because you've got a whole lot of policy in the road that interferes with it.

I: So you're talking about a constraining type of policy?

R: Yes.

I: You had said earlier that policy should be a guideline - is that in keeping with what you're saying then?

R: Yeah. I just - I've become a little more tolerant than I was as an administrator, about the boards trying to react in a commonsense way to a specific situation - which as an administrator used make me boil a little bit - when we seemed to have a policy and then all of a sudden, my God, something comes up and they've got to do something else. I've become more tolerant of that. I still don't like it to happen very often, but I do recognize that there is a need often, to react to a specific situation in a way that may not be totally consistent with policy that you've followed up to there.

I: I don't want to lead you but, when you say that you recognize the need for it now, does this have anything to do with the different types of pressures that are on you as a trustee as opposed to being an administrator?

R: No. I don't - to be honest with you, I never felt any great external pressure in either role. The pressure is more a matter of developing a system whereby, basically, pretty well intentioned people can deal in a commonsense way with a situation which should be dealt with in a

commonsense way. If you have too much policy, that can sometimes get in the road of that. In the final analysis, that's what we've got to be trying to get at.

I: Does your view of the nature of policy - what it is, and what it's supposed to do - does that affect your approach to policymaking?

R: Yes. Yes it does.

I: In what way?

R: Well, I think first of all, the more you work with policy, the more cautious you become in how you set it out. You try to - how can I explain the specifics? Ok. Here's something that happened. I'll give you a specific example. We had a pretty serious problem in personal relations ... occurred within our board after the last inaugural meeting. The policy setting out how our committtees are to be structured and how our business is to be transacted is spelled out - it's not really by-laws, but it's a statement of how our board is going to be organized and how it's going to function. One of the things - and I was involved in setting it out - that's probably three years ago - I was on that committee. I had a lot of input into it. And we thought we had a pretty workable policy. And the first thing we do after the election of the chairman and the vice-chairman, we appoint an "ad hoc" committee who are then

to set up the various working committees of the board. That "ad hoc" committee was to be made up of three members chosen at that meeting by the board members present, plus the chairman. This year, that committee of which I was a part of that "ad hoc" committee - plus the chairman was there and two other people - we went into a room and we - there was only one board position that had been changed, so we thought it would be a pretty simple matter - we wouldn't take a week to set up these committees - we'd do it rather quickly in a kind of a half hour recess from the inaugural meeting. We changed two committee chairmanships - with very good intentions. The intention was basically this - the vice-chairman had been chairman of one of the standing committees. The chairman felt that he was probably being overworked - too many demands placed on him - because the chair has tried to be represented at all standing committee meetings. They don't have the right to vote there, but they do have the right to be there and to express their views at all committee meetings. The chairman thought that was a pretty trying situation - to try to attend all those - but he thought that the chair ought to be represented there. I agreed with it, and the other committee members on the "ad hoc" committee agreed, so we said alright, we won't have either the vice-chairman or the chairman be chairman of any of the standing committees. But, they will be - one or the other then - able to attend all of these meetings - so to

spread that load around a little bit. A sensible idea we thought. Plus, we changed one other chairmanship which was neither here nor there, and we went back to the inaugural meeting with it. They accepted our recommendations like that. The next meeting, there was a pretty severe blow-up. The vice-chairman resigned his position as vice-chairman of the board. Now there were a number of factors that contributed to that, but one of them I'm sure, was this kind of arbitrarily changing around of his role when he wasn't there. That was a fundamental mistake in policy. The policy ought to have said that the "ad hoc" committee which structures the standing committees should have two or three members from the board, plus both the newly elected chairman and the newly elected vice-chairman. So, they would have both been there and involved in that decision. And that seems like kind of a small thing, and it's something that nobody thought of at the time, but it's caused a ruckus and now we have a new vice-chairman, and we have a disgruntled old vice-chairman, and

So I guess what I'm saying is, I have become very - my experiences as a board member have made me far more cautious about policy and its possible implications than I was before.

I: Do you think policy is necessary?

R: Yes. Without it, administrators are in a terrible to do, to deal with specific situations on a day to day basis that the board cannot possibly deal with. Without policy, administrators are just - have an impossible task.

I: Can you give me an example of that?

R: Oh, anything. Somebody wants to use the gym. They phone in on Tuesday. They want to use it Thursday night - maybe it's the Kinsmen. They want to have a volleyball game. Well, you can't have a board meeting to decide if the Kinsmen are going to have a volleyball game on Thursday night. You know, those day to day things - and far more important things than that - this whole area of teacher evaluation and examination and testing procedures, promotional procedure - well those things have to be covered in policy so that the administrator then has some guidelines as to how he is to proceed - otherwise he is at a loss.

I: Has your opinion changed in this regard - I'm talking still about the necessity of policy. Has it changed at all, or have you always felt this way?

R: Oh yes - always felt that way. I've just become more cautious about it, that's the only thing - and more careful about setting out policy. It's got to be done with considerable care. You can never cover all possible pitfalls, but you can eliminate a lot of them if you're careful when you're developing policy.

I: Yeah, I think that leads into my next question which was your opinion about the necessity of policy, does that affect your approach to policymaking?

R: Yeah. I certainly think that policy is necessary and important. You just have to approach it with some caution and - you shouldn't just develop policy for the sake of having policy. The policy ought to cover situations that come up with reasonable frequency. You shouldn't try to cover something that only occurs once every eight months with policy, you know? That's something that can wait for a board meeting - or an extraordinary situation - ongoing, day to day, decision making requiring situations have to be covered by policy, otherwise your superintendent and secretary-treasurer have no framework to operate in.

I: I've seen your policy manual, and so you have some policies written down. Should policies be written down?

R: Well, it pretty well has to be because that's the only way it can really be policy. Policy becomes policy when it's officially adopted by board resolution and, barring the resolution containing the whole statement of policy, then you would have to have a policy that the resolution referred to - in some written form in a handbook or whatever.

I: You're saying that it has to be adopted as policy for it to be policy - I wonder, in your own experience as a trustee, are there any practices that happen regularly, frequently, that are not written down or incorporated into policy and yet are accepted as almost standard operating procedures which, in fact, one might term as policies although they're not written down and formalized as such?

R: I'm sure there must be some.

I: Maybe I can give you an example. How about something like - you hire teachers but you give preference to local candidates first. Now that may or may not be in your policy manual, I don't know, but - do those kinds of policies exist or is this erroneous - Am I leading you here?

R: I don't think that there's a policy of that sort. There is a - that's a difficult area. I'm not thinking so much about recruiting teachers as perhaps, in releasing. I'm not thinking of our own board specifically, but I know that there can be a problem if a board has adopted a specific kind of procedure in the past, even though it may not be written down formally in policy, I think the law might say that past practice constitutes policy. I know that the law does occasionally interpret past practice as being policy - has interpreted it that way. So that I guess you can't really say that unless it's formalized it isn't policy. You can't say that because if



you have developed a set of procedures and have taken action on those over a period of time, even though it's not formally a resolution of the board, I think that the courts might say, in some instances at least, that has been your policy even if it was never written down.

I: What's your feelings about the desirability of unwritten versus written policy? The desirability or the lack of desirability? Are there perhaps instances where it's good to have unwritten policy, or are there instances where it's absolutely mandatory to have written policy etc.?

R: I'm always skeptical of unwritten policy because it seems to me, often to carry with it some form of trickery that I don't like. Now there are some pressures, of course, on boards particularly as employers to try to keep some procedures out of policy because they could be perhaps challenged if they were formally written down, or they might be used against the board in a specific situation because of the - what kind of an example can I give you? - It concerns me about unwritten policy - it's not that it's necessarily bad, but it smells that way to me occasionally. If boards are not prepared to formalize and write down their policy, it suggests to me that maybe they think they've got something to hide - that they want to deal with their people in some way that might be challenged by Human Rights Commissions or whatever, and that therefore they are skept-

tical about writing the thing down because somebody is liable to grab them by the ears over it. It seems to me that if a board feels strongly enough about a policy - that they think that they ought to be able to act on it - then they should be prepared to challenge the courts or challenge whoever has to be challenged and make their case - that they shouldn't try to operate on some unwritten policy that may be in violation of human rights, just as an example.

I: So what you're saying is the power of their convictions?

R: That's right. If they're convinced that they ought to be able to act in a particular way, then write it down and adopt it and grab the bull by the horns and challenge the courts on it if you have to proceed.

I: Who makes school division policy?

R: Well of course the board makes the policy. Now ... under the guidance and suggestions of the best people that the board can get to advise them - maybe the superintendent in certain instances - it may be the secretary-treasurer - it may be certain people from MAST - or it may even be in conjunction with the local division association for that matter - hopefully the board gets the best advice that it can and uses its own best judgement as well. But the board makes the policy.

I: Ok, but it gets advice and - am I correct in interpreting what you're saying as it gets it from wherever it can best get it?

R: Yeah. Right. Sure. The superintendent is the obvious first line of questioning on board policy (other than other board members), but of course there are a wide variety of other sources as well.

I: Would that include students, teachers, rate-payers ...

R: Oh certainly, certainly.

I: Ok, how much input should these other individuals which you would use as a resource then - how much input should they have into the policymaking process?

R: I think the fundamental responsibility for making the policy lies with the board as a corporate body voting yea or nay. So the board then has to decide in a specific instance, to what extent they need and want the advice of whatever groups might be involved. The board has - they've got the final responsibility and they have to decide. I don't think that you can set out any rule of thumb that will cover all policy areas. If we're talking about teacher redundancy, for instance, then clearly the local grocery store merchant isn't the one that you ought to be consulting with in that area. Your primary concerns

would be the MAST organization, your own board and your own professional people. If you're talking about where you're going to try and buy fan belts for the buses, then I don't think that the math teacher in the classroom is not the person to talk to about that.

I: So the board decides then...

R: Who should provide the input, and even in some instances, whether very much input at all from outside the board is necessary or even useful.

I: What's the role of the individual trustee in the policymaking process?

R: Well his fundamental responsibility is a voting responsibility - to accept or not accept. Now, if you're talking about developing the policy proposal before it hits the board table, I think you're going to have as wide an involvement as there are ten or eleven men there. Some will be very much interested in policies to do with curriculum and whatever. Others are going to be far more interested in what kind of tires go on the buses. So that the contribution of each board member in terms of the development of a policy, will depend on his interests and what he can contribute. But the final responsibility of all, of course, is to cast the vote one way or another when the thing hits the deck.

I: Ok, can you give me an example of a policy that's been made from input by any group ...

R: Ok, I think the obvious example in the recent past is a commitment made by the negotiating committee to the teachers' organization that we did not want a redundancy clause in our collective agreement. We thought that that would just tie all our hands in a rather silly way, and in lieu of that, we'll sit down with you and see if we can't develop a policy and a general outline of procedures that's acceptable to you and us and in the interest of the XXXXXXXXXXXX School Division.

I: And that would come through consultation with the teachers' association ...

R: Yes. It's still ongoing. I'm not sure that there's a total agreement yet or not, but it's getting close anyway.

I: Has your view of who makes policy - has that changed since you've become a trustee?

R: Yes.

I: In what way?

R: I think I've developed a greater appreciation of the contribution of board members to policy. I think that I - not necessarily the voting because they always have

had to vote yes or no - but the development of the policy. It seems to me that board members have a greater - make a greater contribution than I previously gave them credit for.

I: In what sense?

R: I think that when I worked as an administrator, I tended to see policy as primarily being developed by administrators and laid on the table - either in the form of one or two alternatives or whatever - and the board then selecting. I think now, I see policy - and probably maybe it's just because of a different role - but I see the policy being more the ... the nuts and bolts of it being developed by board members themselves - making a more significant contribution to it than I saw before. And maybe, I think, maybe even having a more meaningful contribution than I gave them credit for before. I guess as a board member I see my own role as a board member as more significant than I saw the role of board members before. It's a bias. It depends what chair you're sitting in.

I: Does the viewpoint you hold about who makes policy, does that affect the way in which you approach policymaking?

R: Yes. I think the more you see - the more important you see a board members' role in policymaking then the more input that you often insist that you have in

developing that policy. The more important you see it as being, and the more meaningful you think your own contribution can be to it, the more insistent you are then in taking part in that policy development.

I: So you're actively pursuing it?

R: Uh-huh.

I: Ok. How are policies made? By that I mean what processes or procedures take place from beginning to end in the formation of a policy?

R: Our board now has general policy statements in most of the areas of day to day activity. So that our actions in terms of policy now tend more to be in reviewing and updating and altering existing policies. The transportation committee, for instance, there is a transportation policy - when we decide that it's time to change the general rules of the game as to how close you come to the house and all these sorts of things, it's not a matter now of developing a total policy. There is a policy there. It's a matter of amending, updating and altering to suit changing circumstances.

I: What steps do you go through?

R: Normally it's discussed by the standing committee. Now, it depends where the policy change has been

initiated from. If it arose - or the discussion of a change in policy - arose because of a request or a petition or a whatever that might have hit the board table, the normal procedure would be for that to be referred to the standing committee. The standing committee then discusses the issue at some length and interviews whoever is involved - if there are groups of parents who want to talk to the committee or whatever - get that kind of input. They would then return to the board with a recommendation as to whether the policy ought to be changed or ought not to be changed. And if they think it should be changed, specifically how. The board then will to some extent re-hash the issue, depending on how controversial it happens to be and - not always, but normally acts on the recommendation of the committee. Now not necessarily of course. You can't take away from the board the final right to say yea or nay, but our board has tended to operate, to a large extent, on the committee recommendations in areas of policy.

I: When it gets to the standing committee, is there some evaluative kind of process for them to come up with a recommendation - what do they do to arrive at a recommendation?

R: It depends I suppose, on what the situation is. If the problem that we're trying to deal with here through policy has arisen because of some clear unhappiness



on the part of certain ratepayers - maybe it's over the service if it's transportation that we're talking about - the kind of service in a specific area - maybe they're just unhappy about pickup times - then it would be a matter of the committee probably meeting with those concerned parents to find out specifically what their concerns are - then it would be a matter of - if it's pickup times - making comparisons across the division - what are our pickup times here, here, here, and the other place - is it possible to change this particular situation without costing the school division an arm and a leg - you go through that kind of consultation. Normally most of the legwork in terms of comparative pickup times, for instance, that would be done by either the secretary-treasurer or the superintendent - normally the secretary with transportation in our division - would have done the necessary paperwork in terms of compiling comparative information and so on. But that would be the procedure. The office would accumulate the - do the legwork so to speak, in terms of collecting the necessary information to make a decision and then the board members hearing themselves- the concerned people - who are heavily concerned - and then recommending to the board based on their best judgement of the situation.

I: What things - generally now I guess - what things influence how policy is made?

R: Well I suppose, if you're talking about very fundamental things, I would hope by and large, commonsense. We're operating a public service within the constraints of having to pay for those services. So I think that whether it's transportation or whether it's an expansion of the home ec. room or whatever, that we try to put together the best service that we can within a reasonable cost. And I think that basically it's the board members that have to decide - is this request that we are being presented with - is it sensible and reasonable in terms of our available resources and so on.

I: How do you know when a policy needs to be made or needs to be revised? How do you know when that is necessary?

R: Well, one of the areas that we've had to do a lot of brushing up on policy lately - and I keep referring to it - but it's this business of community use of school facilities. But, not so very long ago, virtually every request other than school use of school facilities, would come to the board table. Now, when that starts happening - when you start spending fifteen or twenty percent of every board meeting dealing with requests for use of gymnasiums or something, then of course it's a pretty clear indicator that you need some sort of policy there so that the administrative people can handle that on an ongoing basis and not be

pestering the board with it every meeting for half their meeting or whatever.

I: Are there any other kinds of roadsigns that tell you that policy has to be made or that policy has to be changed?

R: Well, general dissatisfaction. If you get people continually unhappy about something, then surely it's time to review the situation and if - at very least, offer the people some sort of rational explanation of why the present policy's in place. You either have to be able to indicate to them why it's there, or if you can't indicate to them that in a sensible way, then you better start reviewing the policy and seeing if it ought to be changed. Whether it happens within the school - maybe your employees are continually unhappy about something or other - it's clear that the policy is not working.

I: These ideas that you have about the policy-making process - how policy is made - how have you arrived at those ideas?

R: I think basically from experience - both from the board point of view and from the administrative point of view.

I: Does this viewpoint of how policy is made - does that affect your approach to policymaking?

R: Yes - more cautious.

I: Are you reluctant to make policy?

R: No. Just careful - more careful that the policy really reflects what you want it to reflect, and also that it doesn't end up creating other problems down the road. You take care in setting up the policy.

I: Maybe you could tell me what are the attributes or elements of a good policy.

R: Maybe, if I was going to alter any of my responses from last night it would be M\_\_\_\_\_'s comment following the interview. The only thing that she suggested - and it was lurking in the back of my mind as I was responding to your questions too, but I wasn't sure how to get at it - but, the policies ought to be consistent - they ought to be workable and reasonable and understandable - and they also have to be consistent with the overall goals and objectives of your organization - and that gets - in school business that - education and what you expect - what your goals are in terms of education - your specific policies for instance, ought not to be policies that are inconsistent with good education - so that I suppose that's the final test of any policy, beyond being workable and whatever it is that contributes to the overall objectives of your organization.

I: Ok. Again, how have you arrived at that conclusion?

R: It just seems to me a matter of logic if you're involved with an organization committed to the goals of education, then your policies ought to be consistent with those goals and limited only by the resources, personnel and financial and whatever that you have to work with - but they ought to be consistent with those educational goals. That may be the problem that can develop with too heavy a concentration on the mechanics of policies - that you can lose sight of the overall goals and objectives.

I: Can you give me some examples of good policies? Or an example of a good policy that fulfills those criteria that you've identified?

R: Well, we're going through an evaluation in our own division right now - being forced upon us by financial constraints - that are forcing us to re-think a lot of policies right from breadth of program offering to what extent we can accommodate even such really basic notions such as individual differences - we're being forced to re-evaluate to what extent we can meet those overall educational objectives within the kinds of financial constraints that are being pushed on us. So, when we re-think our transportation policy, for instance, which at the moment we pick up a lot of kids virtually at the doorstep - in a time of financial

constraint, you have to decide to what extent that policy of picking up right at the door - wherever possible - to what extent that is essential to meeting certain objectives in terms of education - and for me to - for instance, it would seem to me that a policy which said that you had to pick up every kid right at their doorstep - and the costs incurred by that would be sufficient that in order to accomodate that you had to eliminate perhaps a kindergarten program - that that might not be a good policy. But you have to evaluate your specific policies in specific areas in terms of how critical they are in meeting other objectives. That's the kind of evaluation of policy and judgement of policy that's going on I'm sure, right across the province right now - particularly in rural divisions.

I: Last night you said - I believe that you talked about one of the attributes of policy being fairness ...

R: Yes.

I: Ok, do you want to just expand on that a bit?

R: Well, if we relate it to the example of transportation, there is again - one of the objectives of education in rural Manitoba has been for some time to try and develop some semblance of equal opportunity within our divisions as well as in our divisions as compared to urban

centres. And one of the elements of that equal opportunity has been considered to be as good a transportation service as we can put together - so that kids don't have to be on a bus at half past seven in the morning in order to get to a larger school where they get a breadth of program offering that they wouldn't be able to get had they not been on the bus - to try to keep those load times back as much as we can. But, if it gets to the point where in order to preserve maybe an eight o'clock boarding time, we have to do other things in the system that limit their opportunities once they get there, then you have to make value judgements about which is most important in the system and you have to judge your policies accordingly.

I: How do you evaluate policy?

R: It's an ongoing thing ... and right now the major initiator for policy evaluation in virtually all areas is financial constraint - it's forcing us to choose priorities. Now that's a particular aspect of what's going on right now. In the long run the measure of effective policy has to be the general acceptance of students and teachers and parents and community at large, with the operation as it's going - combining that with the evaluations that you either solicit or get without soliciting from other professionals in the field - the professionals that are employed by the division or those that are made available to us by

the province or whatever - to give us an ongoing evaluation of what's going on in our system. Province-wide testing, I think, - I've had some involvement with that from the MAST point of view - and I think that that has something to offer in terms of evaluating our policies - particularly in the area of program and curriculum and whatever. I think part of the purpose of that kind of testing is to give us some kind of feedback on the effectiveness of our policies.

I: You've given me the attributes of a good policy, what kind of things constitute a poor or weak policy?

R: Well, in broad terms, it would have to be policies that are either inconsistent with good education or meeting the objectives - your educational goals - or policies in specific areas that may even be counterproductive in terms of meeting your educational goals, and of course, one of the things - this is why the small schools business has become such a controversial area - because one of the essential elements of making an educational system function well is a general acceptance among students and parents in the community - that it is a good service and that it is worthy of their support. And, a major controversy over the closing of a school - which may have theoretically a lot of gains in terms of breadth of program and whatever that might be made available to the kids - all of that could be very effec-



tively undermined by a negative attitude on the part of the community or particularly the kids and their parents - about that policy. So that I guess a good policy - a poor one is one that antagonizes people unnecessarily or undermines the fundamental support for education which is latent, I think, right across our province - there's a basic support there in general terms, but can be undermined because of specific policy positions taken, not only by boards, but by provinces as well.

I: In all that you've been saying about what's good policy and what's bad policy, I get the feeling that there is some element of policy having to be something of a pleasing item.

R: It has to be at least acceptable. And I think that people have to be able to, if possible at all, understand the policy and see why that particular direction is a good direction - because it's only in that way that they will lend their enthusiastic support to the organization as a whole. And maybe, I guess the crucial thing to me is my own attitude toward education - because I've never seen education as something that you give to kids - like you give them a vaccination for chicken pox or something. The best we can do in education is provide a spectrum of opportunities for kids within which they educate themselves basically. That will only occur or can occur in the best - most

effective way - where there is a broad base of support for the educational organization - by the kids and by the parents - first and foremost - there are other groups as well, but those two groups first and foremost.

I: The viewpoint that you have about what's good and what's bad policy, does that affect how you approach policymaking?

R: Certainly.

I: In what way?

R: It makes me more careful about radical policy changes. It perhaps makes me - and this is my board experience more than my administrative experience - perhaps more inclined - not to go out and necessarily pound the woods for suggestions, but in areas where there seems to be some likelihood of misunderstanding or misinterpretation or whatever, to encourage the board to make itself available to meet with community groups if they wish. I don't think that we ought to be going out and rounding up people to take a public opinion pole every time something has to be decided, but on major crucial issues, to make ourselves certainly available to community groups who want to talk to us and express concerns - listen to them - don't do what they say necessarily, but listen at least.

I: Ok. Have you had any particular experiences as a trustee that have shaped your views about policy and policymaking?

R: Yeah, as a trustee, yes - certainly. You know, we've been involved in some school closures, we've been involved in decisions with regard to changing bussing service that had been operating in a particular pattern for a number of years - we found it necessary to change that bussing service. And, in many instances, it has seemed to me that what problems that we did encounter were problems that arose out of a basic lack of understanding on the part of the people who were receiving the service for the reasons for changing. That misunderstanding often led or on occasions led to people taking rather hard line positions from which it was hard for them to move off, once the rational arguments had been put forward. So I guess, you can forecast where you're likely to get in trouble, and the time for the consultation is maybe before the policy changes come into place rather than after. The trouble is, it's not always easy to forecast where that's going to be so...

I: And that, you would say, definitely shaped your views about policy?

R: Oh yeah, every encounter you have where you find out that you've acted in a way that people misinterpreted or perhaps even acted without a full knowledge of all

the implications makes you approach the next situation that could be controversial, with a little more caution.

I: Ok. As I told you, this research is concerned with how trustees think about policy and policymaking - what's going on in their minds about policy and policymaking. My feeling is that the way trustees view policy and policymaking may well have some kind of a result or some kind of an impact on the types of policy statements that are made. What's your reaction to that premise?

R: Oh yes. Sure. School board members, each one comes to the board table with a little different set of - not necessarily biases but maybe mental sets and that of course influences the kind of policies that the board develops. There are some board members who are much more sensitive to public opinion than others. The ones who are particularly sensitive - they'll tend to do a little bit of a public opinion pole before they take a position. Others, and I still - for all my experience in both administration and as a board member - I still think that I tend to be somewhat more prepared to grab the bull by the horns myself than to do too much consultation. So, you know, you get a balance on a board. But, the one thing that boards - that's why they're elected I suppose, is that they should be sensitive to public opinion, and I've found that around our board table that - a lot of board members are fairly sensitive to

reactions that they get in their place of business or whatever about how things are going in the school division. And if that's their mental set, then they are going to react in terms of formation of policy to what will be basically, at least acceptable, in their communities if not loveable, then at least acceptable.

I: Do you think that this kind of research - looking for what I am - trying to uncover views - do you think that's worthwhile kind of re- search?

R: Yeah. I'm not sure that it will change things drastically but yeah, it should be useful - if for no other reason for providing some sort of rational framework for ongoing education of board members. And in rural Manitoba in particular, I think that we're looking at very large budgets - large sums of money - and boards with still a great deal of control over the priorities that are set within the spending of that money. The more assistance that - particularly new board members can get in just generally - not necessarily a reflection of the way things are, but to some extent the way they ought to be in developing policy, has to be helpful for any board member - a training session that will go through how policy is normally developed has to be useful - it has to be. So, if the research leads to assisting organizations like MAST or the provincial Department of Education or whatever to do a little more of

that - not that board members ought to be indoctrinated, because in the final analysis they still have to reflect hopefully the enlightened opinion of the public at large - but they still do have to reflect the public and carry the public with them in what they do. They've got to retain that kind of sensitivity but still the mechanics - they could be helped a little more in understanding the mechanics of this kind of process than they are at the moment I think.

I: Do you feel that the questions that you've answered are really appropriate ones for allowing me to gain insight into your views of policy and policymaking?

R: Yes, I think so. The only thing - the one area that you might have probed me further that would have gotten you a more accurate view perhaps - would have been pushing me on the idea - and you started on it - on overall goals and objectives. If you had pushed me a little harder at that stage, I think we would have put the policymaking into perspective better - in terms of the overall interview - than we did.

I: Ok. Is there anything that you'd like to add that you feel is important to this study and which has not been covered in the questions?

R: No, I can't think of anything.

I: That's ok. Thank you very much for the time that you've spent on this interview.

TRANSCRIPT # 5

I: Ok, the first question then - What is policy?

R: Policy in a school division, I think, may be defined as the entire scope or rules that you will run the division by - set down by the board and administered by senior administration. Policy is developed through experience - through every means that a school board can find, after having found a need to set rules and to make rules.

I: I wonder, could you give me some examples then of policy?

R: Policy in our school division?

I: Sure, if you want.

R: Yeah, ok. We have policy concerning actual truancy among the children, misbehavior in the school. That has to have policy - we have to have policy in transportation. We have to have policy for our employees. Policy must apply to so many things. Policies are set down by the Public Schools Act - we have no right to change as far as I'm concerned. There are many areas where policy is vague because of legal aspects, however that - that I think -



policy is something that has a very broad scope. I guess that's how one could sum it up.

I: You mentioned earlier that policy was the rules of the ... are you equating rules and policy as being the same thing - or is there a difference there?

R: Perhaps the words were ill-chosen because nothing is carved in stone. And obviously, policy must be adhered to. But if you simply are rigid and your administration is rigid, then there are times when you are going to get yourself into some awful situations both with the public, and with your employees. However, in fairness, policy should be something that's fair to all, and something that you can follow up on and adhere to where possible.

I: How is policy different from goals, objectives or desires?

R: In our division I think, the people who are senior educators set the goals and objectives. After all, we as trustees are laymen. We're not supposed to know - there's no way we can know the intricacies of the courses, for instance. So, goals and objectives in our division - I don't know how it's handled in other divisions - are usually handled by the superintendent and the principals. They will have a meeting before the school term starts. At that point the goals and objectives are set. Mind you, we as a board

have goals and objectives too, but primarily the focus is on the kids and what's going to happen in the schools.

I: Would the objectives that you as a board have, would they differ radically from those of the administration?

R: No, I think our goals and objectives are more unspoken - they're to do as good a job and to be as fair as possible and to co-operate and to have respect from our people that work for us. I think it's an unwritten thing.

I: Why do you hold this particular view of policy?

R: Policy - have I really expressed a view on policy?

I: Well, what I mean is - this view that you hold about what policy is, has that...

R: I feel policy is - and my view on policy - policy is what a school board must have to function. After all, there has to be guidelines for the people who are working for you - and you can't be there because you have a livelihood to make of your own, you can't be there looking over their shoulder, nor, I suppose we'll go into this further down the interview, nor is it fair for you to interfere with what your people are doing, as long as they are

working within the guidelines - so called guidelines of policy that you've set up.

I: Ok. And when you describe policy as being a guideline, and yet there's a rule orientation as well, - it's not rigid, but it should be adhered to - that viewpoint of what policy is, is that something that's developed over time, or is that something you've always had, or..

R: I think it's quite fair to say that it's developed over time because we will find, setting policy, that along comes a situation where the policy simply can't apply. Therefore, you either have to stretch the policy or remake the policy, or re-think it in some manner. I think that you have to be flexible to a degree. I think that's just good local government - not to be so rigid that you're not approachable by any of your people including teachers and parents.

I: I wonder - could you give me an example of - can you think of an example of policy that had to be changed?

R: Policy may even have to be changed and - even we may have to defy the school act to a degree where there is a small child perhaps, expected to walk out the half mile that is mandatory - if we feel it's unsafe - something like that happens - we may make special board motion or look at

it as a board. Suppose that it's during hunting season, or the child is not terribly strong, or it's in an area where the weather can be very bad or something like this - many reasons where you may send a bus in - actually breaking your policy - when, in all common sense, it makes sense to do so. If that's a good example.

I: Does your view of the nature of policy affect the way you approach policymaking?

R: Well I think, and we'll go into this further I'm sure, I think that I look at policymaking as something that I have learned over the years really because - when I first became a trustee, I didn't know a thing about policy and policymaking. And, I guess that my views on policymaking haven't really changed - they've evolved I think, is a better way to put it. At this point, I'm not sure that my view's changed at all. I think I've set my pattern of thinking on this matter. But, I would have to say that as the years went by, perhaps they did change... To say - I guess in answer to your question, my views don't change in this line.

I: Uh-huh, but do your views affect the way you approach policymaking? Are they a direct influence on the way you approach policy?

R: Ok, I'm not really answering your question. Yes, I think - to a degree - my views will affect - obviously we're all human beings and if I have strong feelings about something, then my interpretation of policy could be different than someone else's - that, yes. I think I have strong views on matters.

I: You may have indicated the answer to this one before, but do you think that policy is necessary, and if so, why?

R: I can't imagine a school division without policy. I think everyone asks for it. Even from the beginnings in - what I would say - our job descriptions right down to the teachers' wanting complete policy so that they may know what they should expect - other employees perhaps most of all the administration - must have policy. There has to be policy in the school division, there's no other way as far as I'm concerned. I can't imagine it.

I: Has your opinion changed about that at all?

R: Well, I hate to go into what I'm sure we're going to be going into further on - when you first become a trustee, the biggest lesson you have to learn is to be a policymaker and not an administrator. And, it's a great paradox because after all, you are representing the people - and when you first become a trustee - and I know I did

things - that perhaps were not proper because I didn't understand. The paradox is that you are a spokesman for the public. You are the person - the link between the public and the system, so you should be approachable, and you should be knowledgeable. On the other hand, you cannot administer and get into administering the school without causing problems - and that's something every trustee has to learn once you become a trustee. And if he doesn't learn it, he's a trustee that's into problems all the time.

I: Ok. Did you always feel that policy was necessary?

R: As long as I've been a trustee, yeah. I grew to understand that there was wisdom in having policy.

I: So that did change over time then?

R: I would say that it was only through ignorance that I didn't know you needed policy - not that - I had really no opinion in the beginning on this matter. I've had so many people come on our board - because the whole board has changed in the eleven years that I've been there - who didn't have a clue what being on the school board was like. We don't hold public meetings in that the public never bothers to come in. How we function is really a closed area to the public. You're not really aware - although we publish our minutes - I don't think that anyone perceives

the type of meetings we have - some of them find them, after they become a trustee, rather long and boring. There's a lot of detail and it's not very exciting at times. And other times it's rather heartbreaking to have to deal with the personal matters. So, I think that - I think I'm getting away from answering your question here.

I: That's alright. Your opinion about policy being necessary, does that affect the way you approach policymaking?

R: Very definitely. I realize now that when we make policy as a board, we have to be careful to word our resolutions properly. We have to be careful that we don't go into conflict with past policy. In other words, policy is important and has to be set in a manner that is clear to everyone.

I: When you say "set in a manner that should be clear", are you implying that policy should be written?

R: Every time we make a board motion, we make policy. That's really how we function as a board. Maybe it's not as good as having a policy manual because - we do not have one 'per se' and probably should have one in our division - but we - actually our policy manual is our minutes. Whatever is in our minutes - and they can go back a long way - sets policy, and simply, by carrying an index

of where to find in what minutes specific things, we can locate policy. I think we will be writing up a policy manual, although it will be better - but the problem with a policy manual is that it's ever changing. In other words, if you write up a policy manual, by another three or four meetings, there are several things that would need to be changed in all probability - minor items. In other words, policymaking is happening all the time.

I: Ok. You're suggesting that your minutes that are written down, are your records of policy...

R: One of them at least, yes.

I: One of them?

R: Yes, the main one, yes.

I: Ok, are there some others?

R: Not really. We do not - an attempt has been made to write up a policy manual by one of our staff people and he never got it completed. Since then, it has more or less been in limbo and a lot of changes have occurred since then so it's not updated - further from being completed. So we, no - basically we do not have a document that you may call our policy manual - which I know from experience with other divisions is different than other school divisions. It doesn't cause problems. I don't find it causing problems.



I: Do you feel that there's a necessity to write down policy?

R: I think that it would be perhaps a good thing in many respects, but it's not something we've been called upon to do - have found it necessary to do. Perhaps it is because we have a strong administration - I'm not speaking of our board, but our administration who seem to be able to function without having their policy spelled out before them - seem to be cognizant of what our policy is. Our employees don't demand such a document, so it really hasn't become a necessity. I think that's probably why there isn't one.

I: Ok. Do there exist policies then, that are not written down either in the form of minutes or anything else?

R: I would be very surprised if one could find an example of such a thing because our whole attitude towards policy is born by the one thought that we have created policy at our meetings through our motions, after giving something a lot of thought - after perhaps learning the hard way - through experience or perhaps, in anticipation we will set a policy - no, I don't think there's any unwritten policy - I don't think so. It would have to be shown to me - perhaps I'm wrong.

I: Ok, - as an example, in hiring practices some boards will for instance, maintain the practice of giving preference to local teacher applicants as opposed to the general public. There may be nothing written in the policy manual, or indeed in a motion. By common practice this is a policy that's in effect. Would you say that those kinds of policies might exist?

R: Not in actuality - in our division pertaining to hiring - although you're only giving me an example - but I'll answer you that in our division, by motion, we place the hiring of people in the hands of our superintendent and it remains there. In fact, he would be quite upset if we were to interfere with hiring. However, you do jog my memory by mentioning this and there is one area, perhaps - for instance - in our division there are many little schools - small schools. Yes, we have an unwritten policy. Nowhere in our books would you find it written that we will keep small schools open, and yet it is our policy to do so. So perhaps you're right. Every division has an unwritten policy on some matter. Because we feel that by closing the small schools we would save a little money but we would do harm to the communities because we feel that the communities would like to keep their small schools - we have made no attempts to close them - there are no plans to close them. However, because of the socio-economic thing it's a touchy subject. Even putting policy in a manual about such matter

- first of all it wouldn't affect a decision later on - if there's a change of personnel on the board, they would merely rescind. So, would one call something like that policy? Or would one call something like that - it's very difficult to say.

I: If it's a policy, what is the advantage then or disadvantage to not writing it down?

R: The obvious advantage is not to upset - say someone in a larger centre would know that it was our board policy to do so - and of course we wouldn't hide it from them - it might still upset someone who thought that we should be saving that tax dollar and maybe doing something that would enhance his larger centre. No, that could be the only advantage, and of course you can't hide things from the public.

I: Are there any disadvantages to having unwritten policy?

R: Well, only that I suppose someone could come along and say "Why didn't you have a policy on the matter?" You could be criticized for it.

I: Who makes school division policy?

R: Well from my viewpoint, I guess a very simple answer would be the board.

I: Do they do this in isolation?

R: By no means, no. With, indeed, very often the recommendation of the senior administration, the principals, the public ... But primarily, yes, through their own initiative because it is their function and therefore they are thinking about it and conscious of it, where others aren't. But I don't think we do it in isolation. I don't think so.

I: The input that you talk about of superintendent, principals, public - how much input should these various groups have in the policymaking process?

R: Well here, I hesitate to answer you in one way because the public in this division is almost not involved at all with the school affairs - not because, I don't think, not because they are totally happy with everything, but they are very pleased with the school division. Now obviously, if there's trouble, then people are involved immediately. So, any attempt we have made to involve the people - such as when I became elected I promised to go through my ward and hold a yearly meeting concerning school affairs - I kept my promise for three or four years - there'd be one person who'd actually come to the meeting - or no-one, or two or three people. I was going to a lot of trouble and there was no gain in it. We do not do the things that some school divisions do - holding public meetings. I think the reason is the public doesn't feel the necessity for it. I think if

we did those things it would be something that would not be - the public would not take advantage - the only times the public would take advantage of such a situation is if for instance, a teacher leaving school, a school closing, - something that upsets the public. So, in this way - it's a roundabout answer - but in this way the public has had very little input in policymaking except for areas where they have complained about something we've gotten into - say corporal punishment or something that - it doesn't matter - we may have complaints and it may change our thinking on a matter. But that is not common, let me put it that way. Policymaking is more done through teachers, principals, primarily the superintendent, and the board.

I: Ok. How much input should these other groups have?

R: Well, my view on teachers is slanted I guess, because of my battles with them over the negotiating table. They are a self-interest group amongst those that are very vocal. And then, it becomes difficult for me to sort out what is genuine - genuine worry and preoccupation with our system and how to improve it amongst them, and what is genuine, worry about improving their own interests. There are many many teachers in our division who do a tremendous amount for our kids and volunteer their services and - they have my undying appreciation because they - well my own

children have had benefits from that sort of individual. I don't think our teachers have, in our division taken part in policymaking - minimum - much more do the principals do so, and the superintendent.

I: Do you feel that there should be a diminishing scale then - is that what I'm hearing that the superintendent should have a lot, the principals a bit less input, the teachers less than that and the public - very little?

R: I haven't really said the public should have very little. I'm saying the public could have a lot more if they wanted it.

I: Oh, ok.

R: I think that I am the public as a trustee, and I don't particularly like being set apart from the public. In other words, in some of the situations you've had in, for instance AAAAAAAAAA and the teachers in the past year or two - you have the public over here, the teachers over here, and the board over here. To me, the board and the public are in essence one. I haven't heard that philosophy expounded very much, and I don't know why - because after all we are the representative of... So yes, I think the public should be a part of policymaking. The teachers, if they were different, could be more a part of it - and it's a fact that the self-interest people are in a minority - are very vocal that make

it hard for boards because boards have to be ever on guard to maintain their local autonomy - and this is another area altogether. If we're not, the teachers would in essence take over.

I: Well then, what's the role of the individual trustee in the policymaking process?

R: Well in our division, the areas are very diverse and the role of the individual trustee's first and foremost to think of things in his ward that need policy-making and then come to the board level and help the other eight people to make proper decisions on the policymaking that will stand for good policy and will, indeed, serve in the future. So it's a corporate thing really and the individual in policymaking is - well this will depend of course on the trustees. Some are more outgoing and more vocal and things, but I would think all should first be thinking of their own ward, but not in a selfish manner. In other words, I am a trustee of XXXXXXXXXXXX School Division and not of Ward 3. I think it's a corporate thing.

I: Ok, so you're saying that the individual role is somewhat diminished over the whole board role - is that what you're saying?

R: Yes. Having functioned in a board where there were three very strong people who virtually had satellites

to them when they first came on the board - we had this sort of situation - something like that can't work. In other words, you have to function like a board - very much so. If you've tried the other way it simply doesn't work.

I: Can you give me an example of a policy that's been made by input from various groups that you talked about?

R: Sometime ago when I was first a trustee, we had some discipline problems on buses and we brought all the parents of the children from each bus load, plus the driver into a meeting. From there, we formed a transportation committee of the board alone. Using some of the thoughts that we'd gleaned from those meetings we put together a transportation policy - this is a written policy by the way - that policy has become quite valuable. I think a lot of it had input from - as I say the parents, the drivers, and I shouldn't leave out the principals and some teachers - so this is a sample of where we did make policy using the whole spectrum of our people.

I: Ok. Has your view of who makes policy - has that changed over time?

R: Well, as I said before, it's evolved - I do firmly believe that the board must be the ultimate policy-maker, but it has evolved in a learning process - let me put it that way.



I: Ok. When you say evolved - are you more convinced now that the board is the ultimate policymaker or ...

R: Well let's say that the first day that L\_\_\_\_\_ walked into a school division office as a brand new trustee, he didn't even understand that a school trustee made policy. I think that he saw a school trustee as much more of an administrator. L\_\_\_\_\_ wanted to learn about the curriculum. He wanted to get right into helping to run the schools. He had to learn that that wasn't his role.

I: Does the viewpoint that you hold about who makes policy affect the way in which you approach policy-making?

R: Oh I certainly think so. I am troubled by the paradox, as I said, of being a public representative - supposedly being knowledgeable of a system, and yet having to stay back from that system to a degree, or else causing problems. And, if you look somewhere for the role of a trustee being set down somewhere in black and white, I don't think you'll find it. I think that that makes it most difficult for new people - that's why Roy White holds the seminars for new trustees and helps people who are recently in office, to become acclimatized. That's an ongoing thing - something you have to learn.

I: Ok. You say it affects the way you approach policymaking - your viewpoint about who makes policy - how does it affect it?

R: Well, it simply means that I'm very conscious of policy and making policy, and I think that it's maybe one of the things that we focus on as trustees.

I: You sort of set out to do it then?

R: Yeah. I think that's a very good way of describing it.

I: How are policies made? By that I mean what are the procedures, or processes or steps that are gone through in the making of a policy?

R: I don't think it's highly structured - and yet it isn't totally spontaneous either. For instance, in transportation or in custodial matters we have committees who will recommend policies to the board, and very often certain situations or experiences show us a need for decision making. So, I would say policymaking is often done after the fact, although not always, and I would say that - to generalize on this would be very difficult. It's a broad thing to ...

I: What's the starting point of making a policy?

R: Ok - the starting point of making policy would be two things - first either something happening that would create a need for policy, or something that you're planning that would create a need for policy. I guess those would be the two things that come to my mind.

I: And once you've identified this need what happens?

R: Once you identify a need, I think that it will be discussed around the board table - it may initiate the superintendent or some of your people looking further into the matter - you may initiate a committee to study it as our transportation committee does - or you may immediately make policy if it seems to be something that you don't have to look at very long to make a decision on. It's interesting that our board very seldom rescinds a motion or changes their policy over the last few years. And when I first got on the board, we were doing that sort of thing. So we've learned not to be hasty in policymaking. But I guess the first step is to identify ...

I: You said when you were describing - you know, you identify, you discuss it, you have a committee or you might make a decision - this notion of making a decision about policy - what are you deciding between? When you say that you make a decision about policy - you're deciding, I gather, between different options or ...

R: Well of course, yes, but really what you're doing is setting out something for your people to work with. In most instances, for something for you yourself to work with in some instances. I think that it's very difficult to answer that question.

I: What kinds of things influence how policy is made?

R: Well of course, we're political animals to a degree. There's the political influence - and when I say political, I don't mean politics - we do not concern ourselves with party politics. I don't know what the politics are of most of the people on our board - thank God! We are away from that. But, to a minute degree political thinking occurs - in other words, you don't want to do things that ruffle the public's feathers - that's I think human. Once in a while you have to have the courage to say though, "This is something, even if it's going to be unpopular, that we must do." That's one thing that influences policy. Having respect and understanding for the needs of your employees influences policy - that's another thing that comes to mind. But certainly, the primary thing that comes to mind is - why we're all there - never lose sight of it - is for the students. Most of the things we do in policy-making are towards the students - their needs influence policymaking.

I: Are there things that influence the process though?

R: I've more or less described to you what our policymaking process is. And, external influences are rather minor - as you gathered - because there is very little public input - not too much from the teachers - so I would say that influences are not of a major nature.

I: How do you know when a policy has to be made or revised?

R: Well of course, if a policy isn't working, it needs to be revised. It's as plain and simple as that. If something is making your people unhappy or the public unhappy or causing the students problems or - it's not dealing with a situation, then it has to be revised. I guess what I'm really saying to you is that situations create policy. I don't know if that's a good way to have it or not, but that's how our division seems to work.

I: How have you arrived at these conclusions about the policymaking process?

R: Certainly it wasn't something I learned from a book - it's something that experience has taught me. Whether I'm right or wrong, I have no way of knowing. Perhaps we're doing everything wrong, but as far as that goes, it's working. That to me is a consideration. If the

public is happy with your system, and if, when your system is evaluated, by external evaluation and it appears to be a good system, then your policies and your thinking should have been reasonably sound. We haven't got into the fiscal areas at all - financial area at all - of course policies in these areas are critical to the economic health of the area - that's another matter totally viewed. But, certainly policymaking in this area is critical - in budgeting.

I: Ok, you've described to me in some detail how policy is made and the way that you see policy being made is being situational - is one thing that you've described - and the kind of processes that you go through - knowing those things about policy, does that effect how you approach policymaking?

R: I think so. Really you're focusing on something that I haven't thought of very much. This is something that we did and not something that I was really analytical about to any great extent.

I: When you say it affects your approach, do you aim for specific outcomes - do you go in there with a sort of preconceived idea of what you want to do ...

R: I guess basically, I'm a perfectionist and I'm never satisfied. And I guess the main objective is to run as good a school division as well as we can - to get as much

out of our system as we can and yet spend very economically because we are in a lowly assessed area - we have to balance that - it's very difficult to balance that - and we have to keep a system where we can bring in good teachers. I guess that's what I really care about. I'm very proud of XXXXXXXXXXXX School Division.

I: What are the attributes or elements of a good policy in your mind?

R: Well of course, if you set up a good policy and it works and there's no more problems with it - it solves a problem then that's good policy. In transportation - just to give you an example - there's no end to making policy that never seems to quite fit because it's such a diversity and I think, at our board level, there's more problems rehashing or attempting to define, or really spending more time around that table on transportation matters than anything else. And I think that that's not caused so much by human weakness - although maybe to a degree - as it is by the diverse aspects of it.

I: So are you saying that one element of a good policy would be it's inclusivity - how all-inclusive and all-encompassing it is?

R: Well yes, of course. It has to, if it can, reach out and touch all aspects of the subject. If it

doesn't, a situation is going to arise where there is no policy. And then of course people have to make a decision depending on you seeing if it was the right one and setting up something for them to be guided by at another time. Yes, I think good policy would be all-encompassing if possible.

I: Any other kinds of things that come to mind about what's a good policy?

R: Well certainly a good policy shouldn't create inequalities amongst students or amongst your staff. In fact, it should be something that can be administered by your people without difficulty. In other words, if you set up a policy that doesn't make sense or is unworkable, you've put a terrible burden on the people who are your employees and who are using that policy. Those two things come to mind.

I: So fairness and clarity then?

R: Yes

I: Maybe you could tell me what you feel constitutes a bad policy or a weak policy?

R: We've had examples of those. Certainly we've set up a policy that simply was ill-conceived and often hastily done. That's a learning process for any board. I think being human we're bound to do that - everyone's bound



to do that - I'm sure every board does that - sets up a policy that they regret. I would like to think that that hasn't happened to us but it sure has. What constitutes it?

I: Yeah, what are the characteristics ...

R: Well simply that when one went to apply the policy it did exactly what we mentioned a moment ago - it bothered people or it made them angry - it was perhaps obtuse - the administration couldn't really understand what we wanted - it had to become something we had to re-define. That would be bad policy.

I: Ok. How have you arrived at these conclusions about what constitutes good and bad policy?

R: One word - experience.

I: You've seen it in action?

R: Yeah.

I: Does your view about the attributes of good policy and bad policy - does that view, again, affect the way you approach policymaking?

R: Yes, because having had experienced bad policy - it makes you tread a little more carefully about setting policy and you learn to take a little time to look at all aspects. So, I think in that way you have learned, and that does affect your attitude. I can't think of any other way.

I: How do you evaluate policy?

R: It's something extremely necessary in the school division. Actually, there's no system devised by man that is without some guidelines or rules. That's exactly what policy is for a school system. Without that you have chaos. I don't care what system you have, you have to have some sort of rules - there is even rules to nature - unwritten rules - you can't walk outside in your shirt-sleeves and walk for ten miles if it's thirty below - there's rules to everything. That's my... So, I don't want to say that we have to be set up in a rigid, all-encompassing, guided way of life, but if we don't have rules and obey them, then we're the losers.

I: Ok. You talked about what's good policy and what's bad policy - how do you tell if your policy is good or bad?

R: I think maybe - there's no way you can tell if policy is good or bad until it gets out into the field, so to speak - and then the reactions you get will answer your question - so that most of the time when you've made policy - I guess maybe that's one thing that we don't do and should do - talking to you really brings that into my mind - we don't evaluate what a policy has done after we make it - we make it, and if it seems to succeed, we let it go there. So that maybe you could criticize our board and really it's

just coming to me as we sit here talking, that we don't take a second look at something if it's working well. So, you know, perhaps sometimes we miss a bet by not doing that. I don't know. And that might be happening because we have enough other things to do without doing that.

I: You don't need to go looking for trouble eh?

R: Yeah.

I: I wonder if you can think of an example of a good policy that really fulfills how you define good policy and maybe contrast it with a bad policy?

R: I don't think I have any problem with picking out a policy for you that's really unusual for a school division. We have a great problem in this division with children wanting to go to one town when they live closer to another. In other words, the smaller schools must depend on these children to stay viable. So, we had to set up a policy that really affected people's lives and was very difficult - very very difficult. And what we did was zone the areas - and here you get this regimentation that I hate - and yet we made it flexible enough so that you could have a choice perhaps, to go to one or two schools out of a particular zone. We set a policy on this. And it worked - in a situation where there was all kinds of situations for trouble - the potential for trouble was there - and since

we've set up the policy we've had very little - although there's always someone questioning, more or less, to find out what the policy is. Here we come back to not knowing our policy totally. So that our policy in this area did solve a problem, and yet it was an area that seemed to be something that you couldn't find a solution to. It did at least make it workable. Did I make that plain?

I: Yeah, what about a bad policy?

R: I simply can't find an example that I can really tell you about that comes to my mind right now.

I: Have you had any particular experiences as a trustee that have shaped your own personal views about policy and policymaking?

R: I think so. To give you an example, when I first came into the division - and this will give you perhaps an example of how I functioned in a way that I shouldn't have - there was only half a day kindergarten. Being half days meant that there were children who couldn't go to kindergarten because some of them lived thirty or forty miles away, and it was impossible for the division to return them at noon. The only alternative was one that was not really practical in many educators' viewpoint - was to have all day, every other day kindergarten. I tried to change the thinking of the board when I came as a new

trustee - so I did follow the proper role. When it wouldn't work, I marshalled the public from all over the division and brought in people who wanted it changed - and brought them without even having it placed on the agenda, to a board meeting. In that way the policy was changed on the matter - we created policy through my efforts - but I did not function as a trustee - I functioned as an adversary almost. Now, I would never think of doing anything like that.

I: So your own experience and your own work has influenced your thinking about policy and...

R: That's right.

I: You wouldn't want somebody to do that to you.

R: No way - I would be quite upset now if someone did what I did.

I: This research that I'm doing is concerned with how trustees think about policy and policymaking. I feel that the ways trustees think about policy and policymaking - how it's made - that may well be influential in determining the kinds of policy statements that come out of their deliberations. It might influence the complexion of the policy statements. How do you feel about that?

R: Yes, I guess you're right. I think so. Yes.

I: Do you think that this kind of research is valuable?

R: All research is valuable. I'm sure that you'll be writing a paper on this matter and in fact I'd be interested in reading it. Anything is valuable that makes you search your inner mind, so to speak, and as you noticed while we spoke here, I even thought of one thing that perhaps we as a division weren't doing - that we should be taking another look at our successful policies and not be too satisfied if they're working. Yes, research of any sort is valuable. The trouble with a paper like the one you're probably going to write is that it's probably going to be heavy and hard to read, and if one doesn't really sit down and make one's self concentrate on it, it will be too easy to put it aside. Many valuable works, I find, and I read reasonably well, I find that if reading is laborious, one is liable - because you've got many things on your mind - to put it aside. This is my great problem.

I: Do you feel that the questions that you've answered in this interview are suitable for the kind of information that I'm looking to gather?

R: I have no way of knowing. I think that perhaps I've failed you in some ways in this interview. Perhaps our system is not one that you really wanted to hear about. I would - if I analyze you properly - you would feel

that we are not involving the teachers and the public enough in our policymaking.

I: No, actually, what I want to find out is how trustees think about policy and policymaking - just generally - and that's all I'm after - not to make a judgement. So do you think that the questions that I've asked will help me to get an understanding of how you think about policy and policymaking?

R: I think so. You've seen inside of my head a little bit this morning.

I: Is there anything that you'd like to add that you feel is important to the study - remembering that the study is about how trustees think about policy and policymaking - and that I haven't covered in these questions?

R: Well no, I think that I can say what I said a moment ago in that policymaking in financial areas is so very difficult and - the dollar is really all we talk about as a school board - and perhaps that's wrong. If you follow what I'm saying - we set policy continually and we're influenced by the money we may get and how we may spend it, and the restrictions that we function under. And, we don't get into curricular matters and looking at that part - and yes we're laymen, but maybe our professional people should be sharing with us some of the things that are happening in

this area. I think it's only time that prevents us. It's not that they wouldn't. But if we weren't worrying about putting a toilet in some school or fixing a roof or where the dollars were coming from - maybe we could peruse the things that are perhaps of greater importance in many ways than we really - at our board level - and I don't think that this is happening to school boards - from my conversations with my colleagues at MAST - we don't have any input almost into the curricular aspects of our division. So, I guess in this area, I don't think that policy is really something that - in our division - is satisfactory.

I: I want to thank you very much for giving me the time for this interview.

R: My pleasure.



TRANSCRIPT # 6

I: Ok, the first question that I have is - in your own words and in your own mind, what is policy?

R: Policy is a guideline - it's a tool - it's the method by which you can effectively run either an organization or a school board. It's used, I think, in its proper sense, as a guideline. I don't think that you can say that a policy is - this is it - we're not going to deviate from it - because it's changeable - it gives the board some good direction if they follow it and it also is flexible in that it can be changed by the board whenever it becomes obsolete or whenever circumstances change so that it warrants a change in policy.

I: Can you maybe give me some examples of what you consider to be a policy?

R: Oh, well we'll do one for trustees - policy with regards to travel expenses and if you go to a convention and what happens when you go to a convention - who gets to go - what kind of monetary remuneration do they get - and when, you know. That's one example, so our board policy happens to be that if there's conventions during the year,

four trustees get to go. There's a policy that lists the trustees in order of priority, and it spells out so many dollars for transportation - it spells out how many dollars per day you get for meals - it spells out how many dollars can be spent on laundry and that's basically what you get - so that you know that if you decide to go to a convention that you have that X amount of dollars that is going to be provided and that if you want to take your wife along and that sort of thing, that's all extra, so you can budget for that. Now, in 1974, when I first went to a convention, the dollars were different and over the years, because of rising costs and that sort of thing, the board were able to change the remuneration offered to go to conventions. They also changed the priority list - in an election year the new trustees are moved to the top of the list automatically so that they have first opportunity to take in whatever convention they want. That's kind of an example of how it would work for trustees. Another example would be in the matter of personal leave - bereavement leave - that sort of thing - leave for educational purposes as far as the teachers are concerned - it spells out how many days they get, what the line of communication is in order to request the time off. If it's granted, will it be at a per diem rate or will it be at a substitute rate or will it be gratis? So, that gives a clear definition to the teachers and to the principals and to the superintendent's department - how that particular

procedure works - and the teachers know up front whether they're going to have to pay a full day's salary to take the leave, or whether they're going to have to pay a substitute rate or whether they'll be given it gratis. And they know - it helps - you may not particularly like the policy or the way it's written at this particular time but, a good argument to the board could change it. If the board's realistic about their approach to it - any particular situation that's in policy - I think that they could change it.

I: How is policy different from goals or objectives or desires?

R: Well I think goals and objectives are - we did a goals and objectives study some three to five years ago - a goals and objectives study is like - where are you now and where do you want to be next year - two years - five years down the line. Whereas a policy is a guideline for what's happening now. I think that's the basic difference. Goals and objectives are things that you strive to achieve whereas policy is a guideline for what's already there in my perspective.

I: Ok, so you're saying that policies are pretty immediate then?

R: Yeah, policies are - from my perspective the guidelines under which you operate now - goals and objectives are what you want to achieve in the future.

I: Is there a relationship between goals, objectives, desires and policies?

R: Yeah, there is. Policy can be a basic statement - something along the lines of "The school board wants to obtain the best form of education that it can for its students." By doing this, they will set out certain goals and objectives over the next period of time - but it's a more broader statement than that step.

I: Ok, you said earlier that it's a tool or a guide - I'm just wondering - is there some difficulty then, when it's such a broad statement, for it to be an effective tool or an effective guide?

R: It can be, but mostly policy is very specific and deals with a certain area of the operation of the school division. I can maybe give you an example of what - here's an energy conservation program - and here's the statement: "The board of trustees encourages and supports an energy conservation and education program designed to substantially lower the consumption of electricity, natural gas, heating oil, gasoline and water, and which will develop an understanding of the importance of conservation for all natural resources." Now that's a fairly broad statement. Everybody wants to be energy conscious - especially in these times of high cost. It goes on to say: "It will be the responsibility of each employee and student to actively participate

in the energy conservation program as outlined in the regulation. With the co-operation of all concerned, the school division will be able to develop and maintain programs for the short and long term benefit of students in the school division." So there I think, that kind of ties in the goals and objectives thought of the school division - and that is that we want to keep our costs down as far as energy are concerned, and yet it's still a broad enough statement to say that everybody in the division is responsible for trying to maintain that kind of conservation - "...and it is expected that all employees will share the responsibility for the implementation, monitoring, and evaluation of the energy conservation program, and that recommendations for the improvement of the program will be submitted to the appropriate member of the senior administrative staff." Now that's the policy adopted in 1979 - October 1979. It has a regulation which sets out the responsibilities of the custodial people during the heating season, during the cooling season, and in general. It deals specifically with keeping the hot water tank temperatures at a certain temperature; lowering thermostats; and that sort of thing. It also sets out the supervisor of maintenance to check lighting levels and to see that those levels are maintained so that it's comfortable for people to work, but at the same time try to keep a level that will reduce our consumption. Also, it gives the principals and the teaching staff some guidelines

as to turning off electrical appliances and fluorescent lights and what they should - so it gives specific guidelines as to what happens under that energy conservation program under a regulation, but the policy itself is basically a broader statement of what the school division's goals are on it.

I: Do you consider that policy statement - the very first paragraph that you read - you know, the very general statement - that standing by itself, without the further appendages and regulations - would that be a policy, or are you looking at the whole thing in total, including the rather more specific things that come under your regulation?

R: Well, it's a specific - it would be a specific policy on its own. But, without the regulation it wouldn't really have too much bite or too much - too many teeth in it. It's nice to be able to say "Gee, I'd like to save a lot of money on energy conservation." But, unless you have the regulations and the guidelines that you specifically set out, you really don't have too much to go by. You can go back in future years - we could go back and say "We have this policy, is it working for us? Maybe we've got too much policy in this handbook. Maybe energy conservation should be one of the ones that we're throwing out, or maybe it's one of the ones that we're doing extremely well, and we'll

leave it in with some minor or major modifications." You know, the policy itself is a policy of the school division. But, I don't think that it would be effective without the regulation.

I: Has your view of the nature of policy changed since you first became a trustee?

R: No. When I first became a trustee, this policy handbook was just being developed basically. They had it, but it wasn't fully developed. The board at that time took the approach that in order to have a good board, and in order to be efficient, it was necessary to have this policy handbook. And with it, you always have to be a little careful. I've always thought that some things are better left not written down. They should be said, but they don't necessarily have to be policy - because you can get mired down in policy. It's nice to say "Oh put it down in the policy handbook." But I think policy should be on the whole - again I go back to the "guidelines" of what you run your division by - and we've done that and been very successful with it. We've also found that if you don't use your policy handbook - if you deviate from what's in here - and I think that that's maybe because we have good policy - that sometimes you get yourself in trouble - that if you get back to your policy - if you're not too far stretched out - if you can get back to your policy, get back in line - that

you find that your situation is taken care of and you get back into logical perspective from your policy, and it works - it works well. Ever since I've been on the board it's been there, and I agree with it. I think it's good.

I: Ok, does your view of the nature of policy affect your own approach to policy?

R: I guess it would. You know, if you believe in it, I guess you have to - you agree with it. I think because I agree with it and because I think it's good for the division, then you strive, when policy comes down, to make it the best possible policy for the division so that everybody benefits by it - not just the trustees, but the whole division and - I'd have to say that yeah, basically that's how I feel on that, and my decisions are based on that.

I: I think you've answered this next question already to a certain extent - that is, do you think that policy is necessary?

R: Oh I think it's very necessary. Again, I'll qualify that with sometimes some of it shouldn't be in the policy handbook. It should be either in a legal contract or it should be not written in at all because you can get mired down. Again, it's - I don't know how any school division operates without good effective policy.



I: Are there - carrying it one step further I'm jumping to a different question - you said a policy is necessary and yet some policies should not be written down. I take it from that that there are policies that exist that are not written down.

R: Well, if they're not written down, they're not policy. I don't know - the policy gives you the consistency that's needed to run an operation, but sometimes you just have to make a decision and that decision is made by the superintendent or the board or the principals or whoever. That's maybe good in itself - as opposed to having it written down in policy - and I can't right off the top of my head think of a specific example, but some things are better left...

I: I hear you saying that if it's not written down, it's not (at least technically or legally) policy. I'm wondering - is there such a thing as 'de facto' policy by virtue of how you view something. For instance, are there some common practices - usually agreed upon by the board who say "This is how we do things, and we don't have it written down, but everybody knows that this is how we should do it."

R: Not particularly in this board. There may be one or two things, but as I say, I can't think of them off the top of my head right now. Ok, as an example, when it

comes to hiring practices for a teacher or for a custodian, maintenance type person, the general rule of thumb is that the superintendent's department and the principals look after hiring the teachers - the secretary-treasurer looks after the maintenance people. The board doesn't get involved with the particular interview situation with the teacher. They let the principal and the superintendent's department do that because they're the chief educators of the division. Now, we could have a policy that says that this is the way it is going to be, but we don't particularly - we say "When it come to management personnel, the board through committee will sit and interview the candidate along with the superintendent's department and or the secretary-treasurer." But, we don't have a policy that says that. It's just something that happens. If that's a kind of example that you're looking for, yeah, that's maybe something that's the rule of thumb rather than policy.

I: The advantage of not having it written down is, I assume, that you're not bound to it - you're not stuck to it...

R: No, and any board member who wants to take part in that interview, he's more than welcome to do so in that particular point in time - but, you know - we leave it to their discretion.

I: I asked you earlier if you thought policy was necessary and you said that you felt it was very necessary. Can you give me some reason as to why it is so necessary, and whether or not your opinion has changed over time in this regard?

R: Ok. I don't think that my opinion has changed at all. I think it's necessary because I think that a school division has to have guidelines under which it operates, and those guidelines have to be consistent. You can't give one person one thing and another person another thing for basically the same request. If you do that then you have chaos - you have jealousy - you have nit-picking - you have low morale - your executive people not knowing where they stand - you have your middle management people not knowing where they stand - you have favoritism - you have all sorts of things that are negative happening. And, I think that with good effective policy - although everybody might not necessarily agree with the policy - it's consistent and it gives you that consistency which gives you an effective organization. It gives you the guidelines and everybody knows where they stand, and everybody is treated more or less the same. And like I said, it's not perfect but it's better than having an out of the air decision made for everything that comes along.

I: Your opinion of the necessity of policy, does that affect how you personally approach policymaking?

R: Yes. I think when we have a policy brought before the board through committee, it's discussed at board level - the ramifications of why the policy is being changed or put in are discussed - and everybody has an input as to whether or not that policy is good or whether it should go back to committee with a view of change based on the decision of the board at that particular time and its perspective of that particular situation. So, I think that when I look at policy, that's basically the way I look at it. What's it for? Is it good for the division, and are we covering all the bases? Are we covering all the aspects of it? Sometimes you think that there's a lot of pressure and a lot of - not too much time to get this policy into place, but usually when you back off and have a look at it and put in the modifications and maybe send it back to committee for re-examination, you come back with better stronger policy that doesn't need to be changed once a year or every six months - whatever. It's a good solid policy that will stand the test of time. That's basically the way I look at it. I look at it too from a point of view that I just mentioned previously - that it's a good administrative tool because of its consistency, and it's just good business.

I: Ok. If policy should be written down, how should it be organized?

R: With respect to who it concerns or with respect to the actual writing of the policy? Like I don't quite understand what you're getting at.

I: Well, are you advocating that there be a manual, or that it be in the form of board minutes or motions...

R: Oh. All our policy - once the policy is adopted or is written goes to board and then is passed at board. And then it is placed - we have a manual - every school in the division has a copy of the manual - every school trustee has a copy of the manual and the policies are entered into the manual under the headings that the policy would more than likely follow. They'll be a policy in the policy manual - we have five or six different headings - we have an introduction that tells you where you can find certain policies. It gives you the basic terminology and it tells you where to find it. So that if you're looking for an administrative line of communication - if a parent say phoned and I wasn't sure of how to deal with that, I could go to the policy handbook - look up under "administration - line of communication" and advise the person that this is the way that they would proceed with whatever complaint they particularly had. Again, when I talked about structure

earlier, and about consistency, I guess the handbook follows that in that it gives you the various structures that we have within the division - it gives you the various areas that are covered for teachers and for administration for hiring policies and all that sort of thing, and that's the way that we set it up. I think it's effective. I'm looking here now and we have a forward to our policy handbook and the basic statement is that: "Written policies contribute to the improvement of the educational program by providing clear statements of policies and regulations. It is the purpose of this manual to present these policies in a form convenient for reference, in order to give trustees, administrators, staff, teachers students and the general public a better understanding of our educational purpose and approved procedures for the operation of our schools. Written policies tend to promote stability and consistency in the operation of our schools, and contribute to the improvement of the educational program. Written policies do not relieve the trustees of any of their responsibilities. They free them from repetitious details and provide more time for planning policymaking and evaluation. Written policies make for efficiency in operation and free teachers, principals and administrative staff for a maximum of effort in planning and teaching. These policies are subject to continuous evaluation and after study, to revision." That statement clearly defines how this school division operates, and how I think that's the way policy should be.

I: Ok. Who makes school division policy?

R: Board.

I: Board?

R: Yeah. It's done through committee structure. It's done through conversation with the administrative staff - with the principals - with the teachers - not so much the general public because the general public doesn't really get into how the school runs. But, when a policy is drafted it's drafted in committee, it's studied in committee and then it's presented to the board for them to study and have a look at. And it can either be ratified or sent back to committee with certain changes to be made, and then it's brought back to the board and passed at a board meeting. Then it goes into the policy handbook.

I: You said that you did this by conversation with principals, administrators, teachers - how much input should these kinds of individuals have in policymaking?

R: I think they should have a fair bit of input because I think it concerns the working of the school division. The teachers have a meeting with their principal in the schools and their ideas come forth from that to the principals' council which meets - I think it's every second Wednesday - the principals meet with the superintendent's department and they express any concerns while they're there

or any ideas that are there - and if there's a policy or a change needed or if there's one that needs to be adopted, the recommendation comes from that by the superintendent to the board committee. Then the board committee looks at it - like I say, if they need more answers they study it - if they need more answers they send it back - it could come from the administrative level itself or it could come from the board itself. It could certainly come from anyone in the division. But, everyone that it concerns has a say in how - in what they think is their idea of what effective policy in that area would be.

I: Could you give me an example of policy that has been made from the input of various people like this?

R: We have a teaching centre in the basement of the school division office. The general idea of that centre was that it would be there for the teachers to have a central source of information for films and for different books and for overhead projectors and that sort of thing. Because each school doesn't have one in it - you get chasing yourself around looking for them and trying to organize your time and that's inefficient. So, it was thought that perhaps it would be better to have a central place. So, the teachers sat down and said "Listen, if we could have this central place, we could do this with it." So the board said "Sounds like a terrific idea. Let's work out something that



we can all live with and we'll set up a policy as to - a general restriction as to what the effect of the centre should be - what the reason for it should be - and then we'll set up some regulations tied into that general policy as to how it should operate and how it should be done." And, we did that. It's very effective - very well used and the teachers had the input into the organization of it. As a matter of fact, it was the teachers who set up the general layout of it because they were the ones that were going to use it, and the board paid the cost of it - a lot of the cost of it - and it's very effective. All of the teachers in the division are able to use it. They know where the films are - they know what's catalogued in there. It's almost like a central library but they call it a resource centre. So that's one example of what we've done.

I: What's the role of the individual trustee then in policymaking?

R: I think the role of the individual trustee is to ensure that the policy that is being put into effect is going to be beneficial to everyone in the division - even given his own prejudices and his own feelings, I think that when policy is decided upon, everybody (whether they agree or not) lives by it. That's the only way you can do it. It's the old story of both horses pulling in different directions and not moving the load. I think the policy,

once the decision is made, everybody lives by it unless for some reason there's need for a drastic or immediate change. I think that the individual trustee at the board level - if he doesn't happen to be on a particular committee - at the board level, certainly has an input as to what his feelings are and what he feels should be for the benefit of the division.

I: Has your view of who makes policy changed since you first began as a trustee?

R: No, it hasn't. It's always been done as I've described before.

I: Does your view of who makes policy affect the way in which you personally approach policymaking?

R: No, not really. I've dealt with it this way all the time that I've been a trustee.

I: Ok. Well, how are policies made? More specifically now - what are processes and procedures - what would the steps be from beginning to end in the formation of a policy?

R: Ok, I spoke earlier of the conservation policy. Basically what happened was - several trustees went to a convention and it was in 1978 - 1979 I guess it was - and they found that at that particular time, everything was

rising. That was when oil prices were going crazy and the gas prices were going crazy - hydro power was expensive - at the convention there was a lot of energy conservation material available. So, we came back and had a look at what was happening in the division. We took a look at our bills - examined them as to whether or not we were efficient and if we were, could we be more efficient? We brought back a lot of ideas that we thought would be effective in our division and would save us some money because, I guess that's basically what we're there for - other than the education aspect of it. So, we decided that we would - through property committee - examine what we had in the division - what was happening in the division. Once we found that - we found out that there were a lot of areas that - of so minor a nature - that it all added up to a tremendous amount of wastage. So we said "Well, if we're going to be effective, everybody should know about it, and maybe the way to do that is to set up a policy, outlining the basic concerns that the board has and set up some kinds of regulations or guidelines as to what can be done to effectively reduce some of these costs." So, that's basically what happened. The property committee, through the superintendent's department and the secretary-treasurer worked with the maintenance people and with the principals, and with the schools and established that policy. It was then brought to board and discussed and that's how that policy came into being. We also have

another policy where we set up a program along that lines with regards to vandalism. We haven't really had a lot of problems in the division with vandalism, but, kids are kids and you get some vandalism and you get some incidents. So, we decided that we'd set up a policy dealing with vandalism that would be a positive approach to the situation, and in the first year of operation we took what previous year's expenses for a particular school had been and we said "Ok, any reduction in that will be given to the student council." It was extremely effective. Other divisions in the province caught on to that and have taken it up. But, we have found that that particular action for the short period of time that it was in was extremely effective. So, I guess maybe to get back to your point - how do you actually arrive at policy - it's through ideas like this. People can go to a convention and come up with an idea, or the general public gives you an idea or whatever - then you work on it and develop it through committee and through board.

I: Ok, what things influence how policy is made?

R: I think it depends on what kind of policy you're talking about. In administrative policy it's flow charts of who you're responsible to. In teachers' policy it's consistency - how do you treat someone who wants to go hunting as opposed to somebody who wants to have two days off because his uncle died - who want to go to a convention

or who want to get involved in a public debate? How do you deal with all sorts of policy with regards to property and how you manage and how you hire your people and how you fire your people and that sort of thing. If it's not tied down in a contract - and you know, that's a pretty broad statement as to what specifically you know, - how is it arrived at? I guess it's basically this situation at the time - if it's not covered and it has to be covered - and if it's not covered through a contract whatever, then I guess you have to decide on what that issue is at that particular time and where it fits into your system.

I: Ok, but just generally, when you're making policy, are there any things that are high on your list of considerations when you're making the policy - things that you look out for and that you pay particular attention to or things that you feel significantly influence you?

R: Yeah. I think that you have a tendency to stay away from trouble. If you try and develop a policy that's going to be fair to everyone, and you try to develop a policy that isn't going to be overly restrictive - a policy that's going to be I guess 'middle of the road' might be a way of describing it, but - sometimes you have to go one way or the other. You can't always stay in the middle of the road. But I think basically, what you try to achieve is - and part of the reason of the policy is to keep you out

of trouble - so that's basically what you look for first. Let's set this policy up so that it's a good guideline that everybody can learn - I think that's the basic concept.

I: How do you know when a policy needs to be made or revised?

R: Well, if you have a policy already on the books that basically talks about the new subject, you can go back and say "Ok, this policy covers 80% of what we're talking about now. So, in order to cover the other 20%, we maybe have to add a paragraph or take away a paragraph or whatever to the existing policy, and then that will cover what we're talking about." If you haven't got policy to cover what you want to cover then, of course, you have to make a new one. But, in the revision aspect of it, sometimes it might just be dating - like it might be from the first of January to the end of June and something might happen, either through contract or through deletion - so you just pull them down - the policy and that's pretty well a decision at the time, and usually the administrative staff says to you "Listen, we have a policy over here that's not effective any more - it's not being used anymore - it's outdated and so we're going to pull the pin on it." But, the process is the same. It goes to committee and it goes to board, and the changes are made at committee level or the deletion is made at committee level, and then it's ratified by the board.

I: How have you arrived at the conclusions that you have about policymaking - who makes it and how it's made etc. - how have you come to have this point of view?

R: Well, when I got on the board, the policy handbook was there - although in its infant stages - and I think the board at that time took the approach that this is the way it's going to be done and this is the way it's going to develop. And, it's been effective.

I: So you learned as you went?

R: Oh yeah, sure. You know, to say that all our policy is good policy would be a little bit facetious, I think. But, basically most of it that is there is effective policy and that's, I think, all you can hope for.

I: Well, does your viewpoint about how policy is made - how it comes about - the processes, procedures, all that - does that affect how you personally go in and approach policymaking?

R: Yes. Yeah, I don't know just what you're getting at, but to my mind you develop a policy for the betterment of the division - for the effective management and running of the division. That's the approach that I take and I guess that's the kind of policy that we have. So, I guess my approach to it and the end result are the same. That doesn't change. That remains consistent.

I: Maybe you can tell me what are the attributes of a good policy.

R: Good policies are - I think I maybe stated this earlier - but good policy is just an excellent guideline - if good policy is there and it's consistent, it makes a world of difference to the employees and to the board because you know that that's the way things are run and that's the way it's done, and it's consistent. Everybody works to that policy so that there's no agitation, there's no particular squabbles about it - here's our policy - here's what we do. You may not agree with it, but this is the way it is. If you don't agree with it, then there is an effective means of changing it, and that way is through committee and through board. Everybody understands that. The consistency of it makes it effective.

I: So characteristic adjectives of good policy then would be - you've said consistency - I read in between the lines here fairness, equitability...

R: Yes, yes.

I: Do I hear anything about precision or clarity or...

R: Oh - I think our policy is distinctively clear - I don't think we get into - I think when we write it, that's one of the things that we look for - that everybody -



so everybody knows and understands - I guess that's clarity - yeah, I think it has to be clear and it has to be definitive - and that's the only way so that everybody understands it and everybody knows where they are at.

I: Again, how have you arrived at that conclusion about what defines a good policy?

R: I just think that from the very nature of our - of that paragraph that I read - of what this policy handbook contains, and what the policy is about that we try to be as fair and as equitable to everybody as we can. I think if you design a policy that's for the division and that everybody in the division lives with - there it is.

I: Were you aware of that at the beginning of your term as trustee? Was that a priority with you or was it something that you learned or experienced?

R: Oh, I think that you always learn that through experience. You'll have certain things come up that you've done through policy - one example is curling - our people in XXXXXXXXXXXX are very good curlers - we've had teams that have gone to Provincial Playoffs and that sort of thing - and they've lost a day's pay to go - and they've been extremely angry with it because there have been other people who have gone to service club functions and had a day off and only had to pay the substitutes wage - but our policy then, as is

now, is it was very clear - that this is the way that this particular situation is handled - and we stuck by policy. We've had to take a look at it on a few occasions and say "Are we really being fair - what's the difference?" And when you start to look at that particular aspect and start to think about changes, it becomes very difficult because - do I give a day off to someone to go shooting, or do I give a day off to someone to go to the art gallery or whatever? So, you learn that - through experience - that it may need some necessary change and maybe through change, something better will come of it. And you also can look at it and say "Hey, we can't change this because all it does is open another hornets' nest." So that's kind of where we are.

I: How would you define bad policy? What are some of the characteristics of bad policy?

R: Oh I think that bad policy is - I've got to be honest, I don't really know where we've run into bad policy in our handbook. Bad policy, I think, would be something that would give a benefit to someone that wouldn't be able to be shared by somebody else in the division. That would be inconsistent - I can't really give you an example because, like I say, in our policy we try to cover all our bases and try to be fair to everybody. I think that would be my interpretation of bad policy - where the policy would get you into trouble with the public and the staff.

I: By trouble you mean raise their backs?

R: Well, if you have - we just had an incident not too long ago where we changed the bus routes in a location and the local trustee, because he happens to live in the community, got involved personally with it. Rather than going to the policy handbook and seeing that this is the procedure that happens, he bypassed some of those procedures because of the local impact and the local involvement that he had in that division - or in that particular area. And it got to be a real Donnybrooke - and finally we got back to a point where we were able to say "Whoa - let's..." - what happened was that everybody got emotionally involved, and they forgot that we had this handbook. So, by the time you finally step back and realize that boy we made a mistake - we didn't follow the policy - then once we got back to the policy, we were able to come to a solution to the problem - not that it was agreeable to everyone, certainly not to the people, but - I guess that that doesn't really say what happens to bad policy because the policy wasn't bad, the not following the policy was bad. I think bad policy would be where it would be inconsistent - where the policy would be that we give the people in AAAAAAAAAA area certain privileges over the people in the BBBBBBBBBB area - and you can't do that. That's where bad policy happens.

I: Your views about what constitutes good and bad policy, does that have an impact on how you approach policy?

R: Oh certainly. I go back to saying that bad policy is something that you - you ask for trouble. It's not consistent - it's not fair - it's one sided - it doesn't work for the good of the division, whereas good policy is exactly the opposite - it's fair - as fair can be - and it's consistent - so you strive for that consistency.

I: Have you had any particular experiences as a trustee that have shaped your views about policy?

R: Not really - I've used the policy rather effectively when I was first a trustee, because you get phone calls from people complaining about something - complaining about a teacher or complaining about this that and the other thing - and it was very nice to be able to open that handbook and say "Listen, I'm a new trustee and this is the way the policy handbook says that you should go. Go back to your teacher, then to the principal and then to the superintendent, and if you have no satisfaction - by that point always get back to me and then we'll make an arrangement for it to come to the board." And, you follow up on that and usually the people have been satisfied after the first one or two calls and the situation is dealt with. So...

I: So there hasn't been any big experiences that have particularly shaped your view about policy then?

R: No.

I: This research is concerned with the way trustees - how trustees think about policy and policymaking and I feel that the way trustees think about those two items - policy and policymaking - might be influential in determining the kinds of policy statements that may result - that is to say, how you think about policy and policymaking might have an impact on the kinds of policy statements that come out of the board. How do you feel about that?

R: I think that would be a pretty fair statement. If I didn't believe in policy - if I just felt that you know, I'm a trustee and I'm going to run the division the way I see fit, and I'm going to go in to a school and tell a principal that I don't think that his yard's clean or I don't think that his hallways are clean or I don't think that they should have this book in the library or whatever - and our policy of the board said that, in order for me to do that I had to follow certain procedures and certain steps to do that - then you know, I wouldn't be living by the policy and I wouldn't be good for the board. If any time a policy came up - if I was against the policy or against the concept of the policy, I'd have a hard time staying on the board I think because your frustration level would be such that you

couldn't do it. I think that if you're against policy, that if you don't think that a school division can run effectively by a policy - by good administration - that you're going to find a board that's in trouble - if you have the majority of people thinking that way - because they're going to prove that they're being inconsistent. They can't be consistent all the time - because personal prejudices and personal viewpoints and all sorts of other things come into play. And, if you're against policy - if you have no policy - something will come up and somebody will say "Well, last time you did this. And last time we got burnt doing that, but we haven't got a policy to fall back on so we're going to change our minds in midstream." So the first person in the door got treated perhaps fairly and the second person coming in the door says "Well, you did that for Johnny over there, why can't you do it for me over here?" And I say "Well, we didn't like what happened over there." So you lose the consistency and you get - you don't have fairness and it breeds discontent. So I think that a person who believes in policy and effective policy is going to be farther ahead than a person who doesn't believe in it at all - and I'm glad that our division has good policy because I find that it's a good means to a good end.

I: Ok, well you know what I'm after in the research then - that is, I think that all trustees think about policy one way or another and so I'm trying to get at

what it is that trustees think about policy - what is the set of ideas or views? Do you think that that kind of research is worthwhile?

R: Oh definitely. You know, we get a lot of information from the States where there's a lot of traditions that are - they operate under a different type of system - but boy, they don't have any policy and the ones that are in trouble when you go to these conventions - the ones who are in trouble are the ones who don't have the policy. I think a trustee should just think about policy. I think that they should do something about policy. Again, with moderation - I don't think that you can tie everything down to a policy. I think that you have to use some common sense - but I think that on the whole, that if you're going to run an effective division, then you have to have effective policy - and it's the only way that you can run a good operation. All you have to do is find a division that's having trouble - it's having trouble with its teachers - it's having trouble with the general public - trouble with management - and you're going to find that that division doesn't have good definitive policy that's being followed by the board. Now it may have the policy there, but like in some homes the Bible gets put up on a shelf and collects dust - and it's moved every time the mother dusts it - and that's sometimes what happens with the policy handbook in some divisions. You've got to use it and you've got to make

it effective - and the way that you do that is by using it. I think - I don't know what your results - or who said what to you with regard to policy - I think that everybody will probably agree with you that you should use policy - that there should be some policies for the division - but I think that if the question was asked "Does your board effectively follow that?" that you'd probably get a different answer. I know that this board uses it and uses it effectively but I think that if - you're going to find that boards that are in trouble are boards that aren't - they may have the policy but they're not using it.

I: Ok, you know, the questions that you've answered and now that you know what I'm after which is really some kind of understanding of trustees' viewpoints about policy - do you think that the kind of questions that I've asked you are suitable for gathering the kind of information I'm after.

R: Yeah, I don't think that you could change it too much. I don't think that you could just come and sit and talk to me about policy - you're coming and sitting and talking to someone who really believes in policy and who has actively participated in making policy - who believes that that's the way a school division should operate. I don't know whether the end result of what you're doing is going to enable trustees to look at that report and say maybe we



should have more effective policy, or maybe we should throw out our policy handbook or whatever - or the general viewpoint overall is this - and we continue on with what we're doing. I think you'll probably find some very interesting answers throughout the province - just knowing the trustees that we interrelate with two or three times a year - that some of them that probably would not want to have anything to do with it while some of them would say "Oh yeah it's nice to have policy but I'm too busy to make policy - we've got things to do and it's ten o'clock and we can't go on like this any more - at twelve o'clock we've got to call the meeting but yeah - I think it's going to be interesting to see what the results are as to what - I know we've had two or three divisions come to us and examine our policy handbook and see how it's made because they've had trouble and - now I don't know whether or not they've ever used it but, they've decided that the way to run a division is with good policy.

I: Ok, is there anything you'd like to add that you feel hasn't been covered and that you feel is maybe important to the study?

R: No, I don't think so. I think you've pretty well asked the question. I don't know - like I gave you our basic concept of what our board thinks of policy - what the opening statement in the policy handbook is. I think that

maybe it would be interesting to find out what other boards think their policy does for them and I think it would be interesting to hear one or two viewpoints as to why they don't think policy should be in place at all - but basically I think that you've covered everything, and I don't think that you can get too much more specific because it would tend to be more what the policy is rather than what decides the policy and that sort of thing.

I: Ok, well thank you very much. I appreciate the time you've given me.

R: You're welcome.

TRANSCRIPT # 7

I: Maybe you could start by telling me in your mind - what is policy?

R: Policy is general direction that the board gives to the administration such as religious teaching in and during school hours - the board would give a yes or no - according to the school act, we have to allow it to go on in our buildings, but it would be up to the board ...

I: Ok, you said it's general direction - what do you mean by general?

R: Well, I think the board are lay people and they have to rely heavily on their administration. Myself being a teacher does not mean that I am an expert in administration. You give them guidelines and they administer the policy - and as I said - if policy's too vague - let's say one policy we have here hopefully, is half an hour's phys. ed. a day per pupil and that's hopefully a long term goal we set forward. Now it's a lot harder to implement that and if the administration has problems with that, then they come back and say "Ok, we're finding that this is impossible because of X dollars" or "We need more space" or whatever it

may be - so then the board has to decide if the policy's going to continue that way. A topic like sex education - it's to be taught - the menstrual cycle is to be taught to all students by grade six - bang - you do it now - but the general direction is given and they carry it out.

I: How is policy different from goals or objectives or desires?

R: Well, I think policy is something that is set down in black and white and goals is something that you'd like to see - such as the phys.ed. half an hour a day - that doesn't mean gym time - that means class time you can do exercises or whatever - goals are you know, like I would like to see - my goal is to see counselling - elementary counsellors, but right now, it's not feasible with budget, you know, and everything else. So I'm not going to put it in there as policy because budget-wise it's not feasible at this time - to put them in every school - so we're starting off with three schools.

I: So you're saying that policies are in fact enacted goals ...

R: Right. And they have to be followed to the letter and if... something else and we don't put it in policy - we just try to see if we can work it out - first of all get the administration's view if it's feasible and how to attack it.

I: But once you've got that view and you set it - you say that you have to follow it to the letter?

R: Yeah - such as religion in the schools. That policy has to be followed to the letter. There can be no exception whatsoever.

I: Ok, so what you're saying - I'm not trying to put words in your mouth - what you're saying is that policy itself must be followed to the letter, but the flexibility comes in the area of whether the policy continues or whether there is problems with it etc., but as far as it being policy it must be adhered ...

R: If it's unworkable, then they let us know and we either change it or drop it altogether or you know.

I: You may indeed disagree that it's not workable?

R: Oh sure. Oh yeah - and then we say "Make it work."

I: Why do you hold this particular view about policy and what it is? What has led to that?

R: Oh I think I've come to realize that not everything can be done. When we first got on the board - like the board has changed in three years - not personnel wise but just in their philosophy that it didn't have the -

the board did not hold confidence in the superintendent - and the superintendent was - the board was doing the administration's work. That for me was a change - because I came in at the time when there was such upheaval that now that we have an administration I feel confident in that - all of a sudden I find my role completely different in that I've learned what policy is and what administration is - and the difference between the two. It's taken a while to develop that because of the feeling of the board a year ago or so - or two years ago when I first went on. I've learned that policy is something you don't jump at because as I said, as far as I'm concerned, it's followed to the letter, and it's something you have to really do a lot of thinking about and a lot of evaluating before you put it in black and white because - for example if we said the teaching of Mark Twain's "Huckleberry Finn" which is in the paper - a policy that it's not to be taught - well there's great consequences, you know, of all of a sudden you're telling kids which books cannot be read and which books can be - before you can do policy you have to make sure that it's right.

I: Is it fair to say then, that your view of the nature of policy has changed since becoming a trustee?

R: Definitely. My feelings of the trustee's job has changed.

I: Does your view of the nature of policy affect the way in which you approach policymaking?

R: Yeah. As I say, I approach it - from the beginning I was 'gung-ho' and I was going to change everything radically and I was going to - there was a lot of things that - but you know, you have to slow things down and you have to take other people's views into account. I guess - some people would call it maturity, some people would call it joining the system I guess, you know.

I: So you have a more deliberative approach now?

R: Yes. Yes.

I: Ok. Do you think policy is necessary?

R: Oh there has to be guidelines or else - I think the public demands it. For example, again sex education - if we didn't have policy on that and teachers went out and did it without - say taught it to grade four and didn't inform the parents - didn't get their ok and didn't you know - and just went ahead and did it - the public is going to be very alarmed and upset. Therefore, if the guidelines are given for the teachers' protection and how things are, you know, - we don't tell them how to teach a course - the Department of Education sets out the guidelines, I think, but we do, in certain areas, give them the guidelines to work under for their protection. I think that's necessary.

I: Your view of the necessity of policy, has that changed over time?

R: Well, I taught for five years before I became a trustee and I'd never heard of policy before - school board policy - you know, right there where I teach you just do your own thing and nobody ever worries about it - so policy has changed because I didn't realize that there were such things as board policies and the teachers had never read them - so, now I have to take a look at why teachers don't read them and how you know - that's why I think working with the \*\*\* (the XXXXXXXXXXXX Teachers' Association) is so important - because if there isn't a liaison between - and a feeling of comfortableness between teachers and trustees and administrators, then half the battle is lost and the school division as a whole can get in trouble and also the teachers privately can get in trouble.

I: Does your opinion about the necessity of policy - does that affect the way in which you approach policymaking - the fact that you feel that it is necessary?

R: Well, ok - maybe the number of changes in the policy or the number of things that we've added to policy since I've been here are maybe five. Those matters don't come up very often before the board - basically because education is something that repeats itself - you know - and the guidelines are already there. So, as I say, the ones



we've referred to - sex education I remember we did - that's a new policy. Other than that, there's only about four others that we've done. So, the need for policy I don't think - again they're general guidelines - part of my frustration also is that the policy manual of the XXXXXXXXXXXX School Division is so out of date that to take a look at it, it's about that thick. Some of it is redundant and so on but I haven't really looked - most and I can see that. Now, we're presently looking at how to turn the whole thing over and - I guess that's the frustrating part of it - policy is needed but - you know, we have to tie into a computer to print it all out to get it done quickly and it takes so many man hours to do that - to tear the whole thing apart and so on - that in three years it will be done - but it's a long term goal, you know - again, taking a look at it and deciding exactly what is needed in there.

I: You talk about the policy manual and that your policies are written down - should policy be written down?

R: Yeah, yeah. But also, it should be reviewed every three years and again, with the teachers, administration and - reviewed and taking a look at it and seeing how it can be improved and how it will change - what things should be thrown out because they're outdated and so on. But definitely it should be there.

I: Ok. Do you think it should always be written down? I guess what I'm asking you is - are there occasions when policies exist and they're not written down?

R: Well I'm sure there are - well can you give me an example?

I: Sure. The school division I worked for - our policy with regard to hiring - our stated policy was that we would hire the best person for the job. Our unstated policy - by virtue of practice was that we would give preference to local candidates - all other things being equal.

R: Yeah. In the division that I teach in, there it's if you speak French.

I: Yeah, I'm just wondering - do you think that policies exist even though they're not written down?

R: Are those policies though? I don't know if they're policies. That might be local biases. I don't think they're policies. If they are, then you're going to be in trouble with Human Rights Commission, you know. The division that I teach in - I know that they want you to hire - if you're a principal, they want you to hire people with zero years experience - they don't want to pay you on the higher scale - but there's no way they're going to put that in writing, you know. I don't think those are policies. I think those are biases...

I: Perhaps practices but not policies?

R: Right. Well practices - they're definitely not policies. If we were to say to our personnel department "Hire only people who live in XXXXXXXXXXXX because they understand the core and everything else" , I would have trouble with that. That's not a policy - although the personnel department might be doing that - it might be doing the exact opposite - but not at board direction - and I don't think that's - although the board has stuck their neck out and told them to - for aids - for teacher aids - to hire local people.

I: And that wasn't written down?

R: Well it was a memorandum probably - it wasn't in the policy manual.

I: Ok, earlier you stated that these were guidelines to the administration - would a memorandum be the same thing - a guideline to the administration?

R: No. If you - again policy are guidelines on major issues - that's the way I see it. Board decisions do not always strike policy - changes in policy - give direction - now I see what you're getting at - does policy need to be written - I see - I think we should draw the difference as to what a policy is and what, you know - direction is.

I: Ok, how do you do that? I guess that's something I'm trying to find out. What's the fine line?

R: Again, that goes back to - I would venture that out of nine trustees, that if something came up for debate - question X - one trustee might recognize it as - it's contrary to a policy, you know, and therefore we'd have to change our policy if - as I say, our policy manual is so out of date and so voluminous that nobody knows it - and that's a part of the problem that I think there's some stuff in there that doesn't need to be in a policy manual - it's too detailed - it's too - as I say it should be general directions for education and after that it should be left at the administration's - maybe I should show it to you - that would be the best way to understand it.

I: Oh I've seen it.

R: You've seen it - oh ok, you know what it's like - with all of these little pieces of paper glued in over top...

I: Ok, if policy should be written down which is what you seem to be saying...

R: Generally - giving the general guidelines.

I: If it should be written down - you seem to be having problems with this right now, how should it be organized?

R: How should it be organized? Well, partly - I don't understand the question but I want to - for example if you remember the bit in the paper about six weeks ago - about the homosexuals and the teachers - it hit the front page there and all that - we don't have a policy. Now, I guess people don't like to discuss that sort of thing until a crisis hits, but what - you know, that's the type of thing you should be looking at - but this board never will - until we have problems. Mind you we had problems last year - one teacher did do homosexual acts you know, so I shouldn't say that - but those are the general guidelines - behaviors by teachers that are acceptable and unacceptable and what we expect from a teacher as far as job, ok? - filling a job - for example, almost in every teacher's contract - I don't about Winnipeg # 1 - I haven't read them, I just sign them - you know - but extra-curricular activities - is that a part of a teacher's job? I think that's policy that a board has to come to grips with and either put in writing or you know, because a lot of teachers do a lot more work than other teachers - or should it be rotated - the basketball teacher does it for two years and - unless he wants to continue. Those are the types of things that I see as policy.

I: Ok, I gather that you're saying that it should be in a manual and organized under different headings.

R: Yeah, I think so - to protect the board - again, I believe in teacher incompetence - if a teacher's incompetent then we have to have guidelines to - of ways of getting rid of them. And if we don't have those guidelines - if the teacher doesn't know what's expected of him, then we aren't doing our job and we can't fault them for not doing theirs.

I: Ok, on this question of policy - who is it that makes school division policy?

R: The board - with recommendations sometimes from the administration - or a member may stand up - like I did on the physiology of the you know, of the female - we were finding out that - doctors were writing us that girls didn't know anything about menstruation and it wasn't being taught - and so I stood up and I said "Ok, ..." and you know, I lobbied - made sure I had support - that family life and sex education is to be taught in our schools, and I want a program developed - and it's presently being developed using the Department of Education's guidelines - but right now we only have guidelines for grades five and six - or the administration may recognize that a new policy is needed and may well bring it in with a recommendation - but it's the board that ultimately decides.

I: Ok, you've indicated that the board decides sometimes with input from the administration - does it end there or are there other sources of input?

R: Oh sure. I would hope - now I don't know because I don't spend very much time here, you know - I would hope that teachers would feel that - well that's part of my frustration also - you know I find that teachers all of a sudden because you're a trustee, they don't want to have anything to do with you - the XXXXXXXXXXXX teachers - they're very wary and so on - which I guess is natural but it sort of hurts because you know, when you want to get things going and you want their input - we recently had a retreat with the \*\*\* executive and board members and a couple of the administration and it was terrific - we found out they were humans and they the same thing - they're human. And I think now that gap is closing, they're going to feel comfortable coming to liaison committee - and it's not going to be interpreted by the trustees as the teachers presenting another 'bitch', you know - these people are concerned and they do have some - and usually - the last one got referred to the administration for a report and it will go to the board.

I: Teachers do have some input then?

R: Probably not enough as far as I'm concerned.

I: Are there any other groups or individuals who have input?

R: Yeah, there's multicultural - we have a whole thing on multiculturalism - we meet with the Premier, we meet with the Minister of Cultural Affairs - we have a multicultural person here - that's all he does, you know - we have workers with CIDA outside - community education - and they - although they might speak to friendly board members outside privately and get hints and so on - but there are many - I guess pressure groups that do come forward with ideas.

I: Ok, well it seems that you're rather wide based then for input. How much input should these people have in the policymaking process?

R: Well, I think it's more lobbying than policymaking. They're interest groups with their particular interests and you have to decide whether or not, that's good for the whole division.

I: So really their role - as part of the policymaking process is to provide you with information, input or points of view ...

R: Right - knowledge as far as they're - in that I make a decision as to whether or not - or it can be general. For example - natives - native education - should we just be offering native education to natives? Shouldn't we be offering what their culture is to all of our schools?



- So we can understand their culture - So we can understand why they're down on Main - why we haven't been able to absorb them into a white middle class culture rather than teaching them just the white man's history books. These are the types of things that we get from the native people, you know. And that's policy - I don't think you say that ...

I: Again, this is an information giving role...

R: It's knowledge.

I: And you set no limits to that?

R: I don't - no - I think that a public representative has to be aware of what's going on out there. If you don't, then you are only going to be you know, what's the vision - tunnel vision - you know, through your own biases.

I: That raises the next question. What's the role of the individual trustee in the policymaking process?

R: To represent their community - and then - which is the toughest part I guess - to represent education for the whole division. An example - we spend a lot of money on the French immersion through schools, through the transportation of kids and so on. The ward that I represent - you know, most people are anti-French or they don't care about French altogether - they might not be anti-French but their kids are not going to French immersion - so therefore,

I have to make a decision whether or not we have French immersion or not - ok? - so, I have to take a look at what my people say but also I - you know, like my view is that French immersion - we can't fight it - there's a need for it - there's a demand for it - sure it costs us money which my taxpayers have trouble understanding - you know, how could you vote for that - but first of all you represent the community, but overall you still have to say "Ok" - even though your community disagrees with it - you know, I make a personal judgement that that is necessary and say "Ok, there's going to be two French schools in the south end and four dual track that are going to cost us X million dollars because they have either decreased or have been wiped out all together - so the tax base, you know, it's going back to the taxpayers. But, those are the type of decisions - you know, not everybody's going to like them. So your question was what is the role of the trustee - I guess it's basically to your - but then generally you have to - the good of the division on major issues. There are also many times when you fight for your own - for example, AAAAAAAAAA residents demanding bussing because the kids were being harassed on the way to school by drunks and so on - so we fought for bussing although I know that generally for the whole division, I couldn't do that ok? But, you know, we proved that the police weren't out there as often as they stated and everything else - so when BBBBBBBBBB comes up, we close

CCCCCCCCCC school - the parents say bus my kids - and I voted against that - primarily because I knew that, you know, that wasn't my area - and I knew generally it was done - but here I fought exactly the same argument for a local interest group.

I: Ok, could you give me a quick example of a policy that comes to mind and that has been formed specifically by input from a number of sources?

R: Yeah - the multicultural policy which is being re-drafted right now. It's taken a long time to do. Originally we're the only - I think we're the only division west of Toronto that has a multicultural policy and we had ours first. Ours is very brief and ten years ago or seven years ago when it was initiated, it was good. But now, it has to be looked at again. That is the main one.

I: So that information is gathered ...

R: Information is being gathered now - one trustee made the motion to take a look at the policy and is feeling very angry because it's taking so long to do, but we're working with the ethnic presidents' association - is working together with the provincial government - we're also in there, trying to develop a policy - probably very close to the provinces because we're working together - but there there are fifty-seven presidents, I believe, that are putting input into our policy.

I: Has your view of who makes policy, has that changed from the time that you began as a trustee?

R: Once again, at the beginning I didn't know what policy was so - I thought we just stood up and we didn't have to follow guidelines - and then we were doing administration's work and I thought that was policy but it wasn't - so it has - yes - it's changed incredibly. Now again, it comes back to the whole thing - if you don't trust your administration then you're going to do all the policy and the administration and now I've learned that it's not a full time job and as I've said before, you just set general guidelines and you keep your nose out of the day to day affairs.

I: Ok, does the viewpoint that you hold of who makes policy, does that affect how you approach policy-making?

R: Well, you don't make policy just for the sake of making policy. Again, that's probably why - if there's a need, then policy is developed.

I: Ok, that's fair enough. I don't want to put words in your mouth, so don't let me.

R: No, I was just trying to - you know - how important it is for again - to consult with outside groups or with the administration. There are some trustees - well

I must say that on our board - that think they know it all - and that's the way it's going to be - I believe that's not the way it is at all. You don't know what's best. You know what's maybe best for you and your little community, but not a huge division like this.

I: How are policies made? And by that I mean what are the processes or procedures - what's the starting point of a policy?

R: Ok - well, getting back to the sex education one - well I put a motion forward that the administration come forward with a policy after study - I referred to the doctors before - and what they had brought forward to us was their concerns - study them, and report back to the board. You see, now there the administration has to be very good at being politicians themselves because they have to sort of guess what the board wants, I guess - which is one of the things wrong with our educational system - they have to guess at how many votes and so on - so it's a board member's responsibility really, to do the lobbying - lobbying is the big thing - you've got to know - if you're just going to put out a policy and know that it's going to be defeated - unless you are somebody that wants to make a point and try and get publicity and that's all, or if you're somebody that, you know, believes in the policy and that it was needed, then you are going to make sure that you have the

votes. So when I put forward my thing on sex education, I made sure I had five votes - and I let the administration know who - you know, I said "We're behind you. Don't worry. We think this is needed. Come forward with a way that this can be handled." And it took six months. They have a lot of other things going on. That's one thing I've learned - you warn them a year ahead of time because a lot of things have to do with budget so you - I've learned that you start policy at the beginning of - as soon as you've finished your budget - 1983 budget and I will come forward with my new policies - and I will say to the administration to study the feasibility of elementary guidance counsellors. Another one was to decide the feasibility of a career resource centre - so it gives them a year to work on it and bring it in for the next budget - so that's the process that I use - I like the word feasibility because it covers everything - give it to the administration and bring it back with budgetary concerns and other aspects that it's going to affect the budget and then it will be debated during budget and if it goes through then it will become policy - we will have elementary guidance counsellors or a career resources centre.

I: You've mentioned budget a couple of times - what kinds of things influence how policy is made?

R: Definitely budget in this economic times - which is really too bad. If we had a clear understanding from the provincial government that they would fund 80%, then education would be a joy - it would be a pleasure. I was just meeting - that's why I was late for your meeting - I was meeting with the superintendent - we're just starting budget discussions next week - we'll see a huge increase and part of the frustration is that 83% of your budget is untouchable because it's salaries - so therefore - well how do you respond? You can't do a lot of the things that you want to do.

I: Are there any other kinds of things besides financial considerations that affect how policies are made?

R: Such as? I don't know what you mean.

I: Well, I think you mentioned earlier - pressure groups for instance.

I: Oh sure. Labor movements to ethnic groups to - and so on. Like ethnic groups have wanted ethnic aides. Let me expand on that. The Vietnamese came over and they were in the English as a Second Language programs and a lot of them were having problems communicating from home to school. The parents didn't speak the language and weren't attending the ESL classes or whatever and, of course, the cultural shock and so on - so they wanted ethnic aides to be

able to go from the school to the home - especially in the evenings when parents are home - and explain things the way things are done here and so on - which I think is a terrific idea you know, but got voted down by the board - so that that's where one group approached me and sat me down and said here are the problems and so on.

I: Would you say - and again I don't want to put words into your mouth - would you say that the financial and the political constraints are about the most influential items in policymaking?

R: Yeah. Well, hold it. In educational - like I'm assuming that education - like any of the policies that are good for education - there's always, you know, whether or not it's worthwhile - but when you take that as 'per se' - then definitely the two after that would be financial and political pressure from the community.

I: How do you know when a policy has to be made or needs to be revised?

R: Ok. A good example - this doctor phoned me last night - has a kid in a special program in which they go at their own rate - progress at their own rate at DDDDDDDDDDD - and the kid has moved from grade two to three - he's been promoted to grade three, starting January third. Now, our divisional policy says we're to bus kids to special programs



up to and including grade two. Now this kid who is seven years old all of a sudden can't receive bussing because she has moved quickly academically. So now therefore, I'm thinking to myself that policy should be reviewed. The parent has brought to me, I believe, something that is wrong with our policy. The board may not agree but it's something I'm going to pursue. I think grade two or eight years old - we provide bussing so that you know, like - this kid is not going to have to make three transfers to get to school at seven years of age - I have trouble with that. Mind you, if the parent wants the program - the argument is, if the parent wants the program let them get the kid to school which is - since we do have this general policy on transportation which says that we bus up to grade three - and I think that until - this parent has an argument and the policy should be looked at. Somebody pretty well has to make you aware of the policy - that there's something wrong with the policy which is probably too bad, but that's the way laws are - whatever - you have to be a politician - when something's wrong with that policy and something should be changed - whether the administration informs you, a pressure group or individually or whatever.

I: So essentially, when there's a discomfort?

R: Yeah - when something's not working. Mind you especially as chairman, you get ten to fifteen phone calls a

week from parents who say this policy - you know, not all of them - most of them - you know, I'm sorry - we can't make an exception.

I: How have you arrived at these conclusions about the policymaking process itself? Is this a thing that you've learned or...

R: Yeah, I've learned - I think it's a learning process - you can jump in and be a dictator - it depends on the person - it's the personality and how they're going to handle it - you've probably heard different stories from trustees in fifteen different interviews - on how it's done or how it should be done.

I: Again, I ask you - the view that you have about policy - how it is made - who makes it - what processes are involved - does that affect the way you personally approach policy?

R: Well, it's what I believe in so it's what I - that's the way I do it.

I: So you respond to it precisely in that way then?

R: Yeah.

I: I wonder if you could outline to me - in your mind - what are the elements or attributes - what things characterize a good policy?

R: Something that is workable. Something that is justified. Something that proves itself two years down the road as being feasible and workable - and it should be evaluated. That's half the thing about these damn policies - nobody looks at them again. That's part of my problem - this is a bureaucratic mess sometimes. I think if you're going to have a policy, you'd better follow through with it and evaluate it - if it's no damn good get it the hell off of the books and move on to something - you know - don't waste everybody's time - that's absolutely - whatever - or just sure it sounded great on paper but you've since found out that it couldn't be worked in reality.

I: What kinds of things constitute a bad policy?

R: Something that you know - the public reacts to negatively. It wasn't for the good of the division - the good of the student - or of our instructional personnel. You know, something that just works contrary to everything that education is about. For example - censorship - if we go in and raid the bookshelves like many school divisions do - absolute crap - that's bad policy. I'm trying to think of another one but I can't.

I: Why is it bad? Is it limits?

R: Limits growth maybe or it doesn't stimulate - it puts teachers in a position where they can't grow.

I: Needless restrictions - is this what you're getting at?

R: Yeah. Basically I guess absolutely bad policy - limitation of the - well, for example, usually we give fifteen sabbaticals. This year we're not - the board decided to give four of them and they voted that down - we're not giving any this year - but I think that's a bad policy in the long run. I think the board is also going to have a policy of no travel this year - that's bad in the long run, but right now it's good - you know, now if one trustee wants to put in no travel ever, of course it could be rescinded later but, I don't think that's good. It's a bad policy.

I: How have you arrived at your conclusions about what constitutes good and bad policy?

R: Experience - although what experience I have - three years - is not very much - and again, listening to people and maybe realizing that they have to - again, going back to the pressure groups or whatever - the administration and - if the policy is bad we can at least take a look at it if they think it's bad and listen to their arguments. Other than that, I really don't know. A gut feeling I guess.

I: Ok. I sense that when you're talking - there's a certain amount of intuitiveness ...

R: That's what I've learned - that I'm not always right - and that's why I think listening to outside sources is so important. You see, I won't name it but you know, out there there's no talking to that group and they do horrendous things. It's just bad policy altogether - all day kindergarten - I think it's very educationally - studies that have been done - you know, kindergarten becomes babysitting - and what do the board members say - well other school divisions do it so we can do that - you know... We won't have guidance counsellors because EEE EEEEEEE doesn't - what's the rationalization - or FFFFFFFF doesn't - that's bad policy - and that's why some boards just do it - or some trustees just do it because of the bucks - and that's wrong.

I: Ok. Your view of what's good and what's bad policy - does that affect your approach to policymaking?

R: Sure.

I: How?

R: Well - what's good policy for administration - you can't lose touch with the field - you can't lose touch with reality - with out there - and I think that's going back again and listening to teachers and listening you know - finding out - hey - listening - you're not stuck. You have to be able to say "Hey we made a mistake - Let's either

change the policy or scrap it altogether". And if you can't do that, then you shouldn't be a bloody politician to begin with - which really trustees are - anybody who tells you differently you know - you have to be able - willing to modify things - and if you don't - then God help education.

I: So you approach it with a moderate kind of view?

R: Sure. Nobody's perfect. Policy that you think - again, if it doesn't work out - fine - be willing to admit it and change it for something that will work - but not very many people think that way.

I: Have you had any particular experiences as a trustee that have served to shape your views about policy and policy making? Anything that sticks in your mind as being particularly formative in terms of your thinking on policy?

R: Well, a couple of times as a rookie, I overstepped my bounds and really realized how - you know, very quickly that I was wrong. Again, it's a learning experience and it's something that you have to keep evaluating yourself and saying "Ok, am I doing the right thing now?" - Maybe I shouldn't be listening to pressure groups - you know I'm willing to listen to someone who's going to tell me - you know - you're only looking after - you know - that indi-

vidual group probably and the whole division - or that policy that you made - you're bending over backwards for that little group or something like that - you know. Sure - you make mistakes and you learn from them. I can't think of anything particular right now that - but I've made some real good mistakes.

I: Ok. This research is concerned with trying to get at and understand how trustees think about policy and the policymaking process itself. My feeling is that the mindset or pre-conceived notions or perceptions or views or those patterns of thinking - whatever you want to call them - about policy and policymaking in the minds of trustees - might be influential in determining the kind of policy statements that emanate from a board. How do you feel about that?

R: Do you mean having to do with politics only?

I: Yeah - I suppose that as an example I might say to you if you have a high orientation of policy as being rules, then the types of statements that you might come up with would be very specific in terms of laying things down - little room for interpretational latitude etc. That's a thing that I posit. I wonder how you feel about it?

R: Whether or not trustees actually do that you mean?

I: Yeah - whether or not the ways that trustees think about policy is influential in the outcome of policy statements.

R: Well, as I've said, this board has written change in the last three years - this board ... That's a tough question. I think individual trustees are going to come with their own prejudices or biases or whatever. Let's talk first of all on the availing the superintendent of the powers to hire everybody - or to evaluate. Ok? Board members might say "Hey listen, sorry - we do the evaluation of the senior administration not you - plus we'll do you. That isn't the way it works here - but it very easily could have - a year ago when we changed everything - the superintendent does it again, but I think that some trustees really feel that they should have input into that because they think - well some of them spend a lot of time here and they think they're qualified to do so. I think that leads to "I'm going to get that son of a bitch" you know - or "Everybody has to kiss my ass" type of mentality and - so it really depends on where that trustee is coming from and I don't think that you can ever decide that - it might be pretty evident but I agree with you that it's the individual you know - where they're coming from. That's why the superintendent's job is so difficult - because that person has to be able to read human character. I don't know if you know K\_\_\_\_\_ - I'm surprised that he didn't resign the way he was



treated by this board - and I was a part of the board. Like the guy just didn't understand the board. He just couldn't read the board. And I guess I'm getting to your problem or question - they have - board members really have to - I can't say that because I know it doesn't happen - I was going to say board members have to evaluate things - one of them just - come here and think they know or they're gonna you know - things are going to be run their way - and if it doesn't happen that way, well we're going to do everything to undermine them. That's part of the problem again, that I have with elections of trustees for boards is - democracy is good, but you always get this personality where - Am I answering you're question?

I: Yeah - I think you're saying if I can paraphrase you - I think what I hear you saying is that - where trustees are coming from - in other words what they bring to the table with them is indeed significant in the kinds of policies that develop.

R: Yeah - it is, but it's a problem also. I see that as being a tremendous problem because you can take the steps backwards - of course you can - you lose an election and the board changes completely - and it reverses everything you've done - then I guess - you know - God forbid if some right wingers got in and cut out all the \*\*\*\*\* programs because they're not given anywhere else in the

division - which is the mentality of some board members - not recognizing the inner city needs and so on - they're bringing their personal biases - where they're coming from - and that's scary but it's reality I guess.

I: Ok, do you think that this kind of research that I'm doing - which is trying to find out what trustees think about policy and policymaking is worthwhile? Will it add anything - will it contribute anything?

R: I'd really have to -you know - there's a different mentality from rural to urban I find in trustees and I guess that's probably mainly because of my political background, but I'd be very interested to know what other trustees think of policy and the way it's adopted and what it's for. Part of my problem in coming here as I said - and you sort of did a double take - when I said when I first got here that GGGGGGGGGG doesn't have a - well they've got a policy manual but nobody knows about it and teachers could care less about it. I'd really be interested in hearing how they think policy is developed and then - trustees should have - when they're elected I think you should go through some sort of educational process of learning what trustee is and what policy is and so on - because I sure the hell didn't get it and I was lost for the first little while. I think I have a fairly good understanding.

I: So you see some value in this then?

R: Oh God yes. School boards are so screwed up that somebody better do something.

I: Ok. The kinds of questions that I've asked, do you think they're appropriate for the information I'm looking for - for how you feel about and how you view policy?

R: Yeah. I think so. I really have a problem with policy because I think most trustees don't know what the hell it is. I think that - well memorandum going from office to office - is that policy? I think it is. That question of yours certainly made me stop and think - because although it's not contrary to the policy - you don't have to put it in writing in black and white - that's again - that's my frustration with this board because they're not willing to do that - the bloody manual has to be looked at and has to be revised and so on - but they're not willing and so on - because that takes work - you know.

I: Is there anything that you wanted to add and that you feel is important to this study in determining how trustees think about policy, and which I haven't covered?

R: No. I can't think of anything offhand.

I: Ok. Then I'd like to thank you for spending the time with me.

R: You're very welcome.

TRANSCRIPT # 8

I: Can you tell me in your own words, what is policy?

R: Well, policy is guidelines set up by the board to further the administration of the division.

I: Ok, can you give me some examples?

R: Well, we have transportation policy and a number of other policies that you - that we use, and from time to time as needed - which we use to regulate our...work.

I: Ok. You say these act as as guidelines - that implies that they're not rigid or hard or fast ...

R: Well, we try to stick to policy but we try to keep in mind also that we are not made for the policy - the policy is made for the board.

I: Policy regulates the board - or does it regulate the administration or does it regulate both?

R: Well, the board looks at their position as setting policy and seeing to it that the administration carries it out.

I: Ok. Maybe you can tell me - how's policy different from goals, objectives, desires - or is it in fact different?

R: Well I would feel that there are some differences because once you set policy there is a certain amount of pressure to stick to what you have set up in policy and not to deviate from it. Whereas, goals - they are not that pointed - not that clear - or maybe that clear but not that - there's not that - I don't know how to put it in words, but there's a difference in my estimation, between policy and goals.

I: Ok, are you saying that goals are less specific?

R: Yes, I guess that would be ...

I: Are you thinking that they're broader ...

R: Well, policy would have more and more detail in what way to go.

I: Ok. Is there a relationship between goals, policies, objectives and those kinds of things?

R: I guess there would be a relationship but goals - the way I see it - is something you aim for and policy is something that you use as a guideline.

I: How have you come to hold this particular view about policy as a guideline and policy as a regulating ...

R: Well I think it's from past experience in my job as a trustee. Whenever issues come up, we go back and see what we have stated in policy and try to - as much as possible - stay within the guidelines of the policy.

I: Ok, you say "as much as possible" - what would dictate that you can go out of the guidelines?

R: Well, we try to take each issue as it comes up on its own merit and if the particular committee it pertains to - the particular policy - that committee would decide whether the policy needs revising or whether we would adhere to it the way it stands.

I: Ok. You say that you've learned a lot of this through experience - has your view changed about the nature of policy since you first became a trustee?

R: I would say somewhat, yes. I would tend to lean towards the policy - it's good to have policy but always keeping in mind that the policy is there for you and not that you're there for the policy.

I: And that's a change from when you were first a trustee?

R: Well yeah. When I first became a trustee, I had the feeling that policy was engraved in stone and that it was a lot more permanent and rigid.

I: Ok, the way that you feel about policy now - your view about policy - does that affect how you approach policymaking at the board level?

R: I guess it would, yeah. You can approach it from the sense that you know that if need be, it can always be looked at and revised.

I: So would you say there's less pressure?

R: I would feel so, yeah.

I: Because it's not engraved in stone?

R: Uh huh.

I: Ok. Do you think policy is necessary?

R: Yes, I think it is because you want to treat issues somewhat with consistency - and if you don't have policy, you're much easier leaned or swayed in going differing ways under different types of pressure.

I: Having a policy - does that eliminate your deviation or does it reduce it?

R: I would say that it reduces it considerably - yes.

I: Would you say that if you have a policy - you mentioned being swayed by different pressures - would you say that some of the pressures really don't apply if you have a policy - that they are influential if you don't have a policy - is that what you're saying?

R: I would say more so, yeah.

I: What kinds of pressures would ...

R: Well - for instance in transportation - if you have a policy whereby you do not pick up students from within a mile, and if you have no policy, a parent can approach you and request transportation for their child, and if it's just under a mile, then - if you have a policy stating specifically what your policy is, then it's much easier to - and the parents are more understanding too if they know what your rules and regulations are.

I: Ok. You've said that the parents are more understanding when they know what the rules and regulations are - when you talk to parents about policy, do you think of it in terms of rules and regulations governing administration or do you still talk about it as guidelines?



R: No, we still talk about it as regulations that we have.

I: Ok. This idea of whether or not policy is necessary - has that changed over time - has your opinion about that changed over time?

R: No, I've always felt that policy was good to have. We have revised our own policy within the last three years and hired a person who we thought was competent in the area and I think we have a good policy as such.

I: Seeing as how you feel that policy is necessary, and have always felt has this sort of affected the way you approach policy making?

R: Can you give me the question again?

I: Yeah - you said that you feel policy is necessary. Feeling that it's necessary - does that make you approach policymaking - does that cause you to approach policymaking in a special way?

R: Yeah - well I think yes - you would approach it with a little - with caution - that you know that you do not make policy just for the moment, but policy that you can live with under somewhat differing circumstances - as they arise.

I: Ok. You made mention of having policies - is this written policy...

R: Yes, we have written policy.

I: In what format is it organized?

R: We have a policy manual.

I: Should policies be written down?

R: Oh definitely.

I: Always?

R: For me there is no other way of continuity if they're not written down.

I: Does policy exist even though it's not written down? Now I know you're saying that it should be written down, but does policy or can policy exist without being written down?

R: In a school board with changing administration - with a changing board all the time, there would be some. But I would feel that it would be very limited.

I: Would they be as effective as policies that would be written down?

R: No. I would say no, they wouldn't be as effective as policies that would be written down.

I: Why might they not be written down?

R: Well, it would be items that came up from time to time which just did not get entered into the policy manual and I guess they would be in the books some place - in the minutes - they would be recorded some place, that's for sure - otherwise they would not be considered. They do not - they're not normally considered policy before they are entered into the manual - it's a proposal until such a time as it gets into the manual.

I: What about a situation where you don't have anything in the manual that covers it, yet you have some past practice, or you have an understanding, among the board members of how these things will be handled - would you consider that to be policy?

R: I guess we would go back and see what we had done in the past and use that as a guideline and if it came up on more - on a number of occasions, I would think that we would put it into policy so that we had something.

I: Ok. So what I'm hearing you say is that there may be two types of policy that exist - a very formal written one and some past practices etc. that really - as far as you're concerned the only official one is the written down one - and it doesn't have official status until it's written down.

R: Yes.

I: But they may both be effective?

R: Yes, somewhat - the one that isn't written down would be - from past experience would be somewhat effective, but not as effective - no.

I: You said that it should be written down - any ideas about how it should be organized? You've mentioned that you have a manual - should it be classified any particular way - for instance, when you write down policies is there anything that you keep in mind...

R: Well we have different areas in our policy manual under different headings for any policies - and they would fit into any one of these areas.

I: So it follows a format then?

R: Yes.

I: Is this one that your board has developed?

R: With the help of a professional consultant - yes.

I: Ok. Who makes school division policy?

R: Well, the school board - with the help of your senior administration.

I: Ok, how does the senior administration help?

R: Well, they would suggest from time to time what they see should be in policy - if it isn't - the board would decide on whether they felt we should have it in policy.

I: Ok - so they make suggestions every so often as to what should be there?

R: Yes. Or vice-versa, the board suggests to the administration to look into it - whether we are adequately covered in any given area by policy and if not, then to come up with a suggestion.

I: I see. Are the - you're talking about the senior administration - who do you include in that?

R: Well, basically the superintendent and also the secretary-treasurer.

I: Are there any other people or any other groups who have input into this policymaking?

R: Yes, although I don't think that the - when I look at the teachers - they would rather have more in their agreement rather than a policy but they are in with policy that pertains to them - yes.

I: So that they are consulted?

R: Yes.

I: Ok, what about parents or students or other individuals - caretakers, bus drivers, people like this?

R: If it affects them. Parents I would not - I'm not aware that we have to any degree used that much, but bus drivers we would - yes - and the working people - the salaried people that are concerned, I guess parents - they have voted the board in and the board figures that they are responsible for ...

I: You mentioned concern - is it fair to assume that you consult people who are concerned with a specific policy and you would perhaps ignore the others who aren't concerned?

R: Well, they would have priority.

I: Ok - I'm thinking - like bus drivers - if you're going to make regulations about what they do with their buses during the day - that you would consult them - not necessarily the teachers' group but...

R: Yes, if it - like in a policy that concerned the bus drivers - and also it might very well concern the principal because he is the go-between between the transportation supervisor and the bus drivers so - then it would be a matter of both parties.

I: Alright. Well, if you're going to have input from these people at different times on different policies - how much input should these people have?

R: Well, I would feel - by suggesting - and then the board could have a look at her - and if we feel that we need information about how they they feel then we can get that information from the parties concerned.

I: So you're not putting any kinds of limits on the amount of input that they can have then.

R: Well, the input - the final result would be what the board decided - yes.

I: So it's the board's decision anyhow and so - are you saying - there's no point in limiting what they say because you still have the final say?

R: Well the - you can never get too much information on anything.

I: Ok. What's the individual trustee's role in the policymaking process?

R: Well, I guess to express himself the way he sees things - but the trustee as an individual does not make decide - it's - but it has to come from the way he individually sees the situation.

I: Ok, you say that the trustee doesn't make the decision - then who does?

R: The board as such - by vote.

I: So you're talking about the corporate body?

R: Yeah, the corporate body, yeah.

I: Ok, so the role of the individual is to give his or her opinion?

R: Yes.

I: Could you maybe give me an example of a policy that's been made by input from one or two or three groups along with the board deciding how it should finally go?

R: Oh, I can think of transportation where we made a policy where we do not want to start to pick up students before 8 o'clock or a given time in the morning and the principal would have his input on that with the board.

I: Were there any other groups that were consulted in that?

R: Not in that particular case - no. Well, we keep in mind the parents' wishes on this.

I: And how do you get a hold of those wishes?



R: Well, in a small division or setting - we have a pretty - parents are not afraid to voice their opinions to their particular board members.

I: So you don't really have to go soliciting?

R: No, I don't. Usually it's the other way.

I: Ok. The views that you hold about who makes policy - you know - the board and the input level and all that - has any of that changed since you first became a trustee?

R: Well, not much - no.

I: It's pretty well how you perceived it when you started out?

R: Yeah.

I: Again, this view of who makes policy - what happens during that process - does that affect the way in which you approach policymaking?

R: Like who has the authority?

I: Yeah - the way you think - the view that you hold is that the board makes policy - it can have unlimited input, but in the final analysis the board makes policy - knowing that, does that affect the way you sit down at the board table to make policy?

R: Well, I guess to some extent it might because you know that the final say so is with the board. I guess if it were differently, then ...

I: How might it affect you? Again, you mentioned being cautious earlier - does this make you more cautious - does this make you more at ease?

R: Well, if other people had a final say so, then the board - which I consider to be an employer - then I would have problems with that because if you are the employer, then you are the ones that have to set up the guidelines for running the operations.

I: Alright. Can you tell me how policies are made? By that I mean what processes or procedures are involved? What are the steps from beginning to end?

R: I guess they would come from any area - for instance, the principal would come up to let's say the education committee, and they would have a look at it, and then they would bring their proposal - the way they see whatever the policy being - what should be in policy - and bring a proposal before the board and then it would be discussed at board level and voted on and that's how it would come into policy.

I: Ok. When you say the principal brings it to the board - I'm not sure what you mean - brings what?

R: Well, whatever his concern is that - a certain area that is not covered by policy which he feels should be covered by policy.

I: So it starts with a concern then?

R: Yes at the base where the concern is.

I: Ok, and not necessarily with the principal where the concern is - it may be with the bus drivers ...

R: Yes.

I: Once that is identified then, you say that it goes to a committee?

R: Yes.

I: You have appropriate committees for various things?

R: Yes. We also have a policy committee that - the policy committee is also a part of the planning committee right now so they would really do the polishing work on it and then present it to the board.

I: Ok, and once again, when you say that they do polishing work, they come up with the statements?

R: The proper wording - yes.

I: Ok. Do they examine - do they have to evaluate - do they have to make choices at that level - what happens?

R: I guess they would study it and see how it would affect the operation down the road and how we would be able to live with it - under different circumstances.

I: Ok, so they do an evaluation of different alternatives then?

R: Yes.

I: And they then present what they feel to be best to the board?

R: Well, to the operation as such - yes.

I: But, once they've chosen what is best for the operation, they then present that to the board?

R: Yes.

I: Now, when it gets to the board, what does the board do with it - does it further discuss it - does it vote on it or...

R: Any board member that has questions - he seeks clarification and he receives it and he bases his vote on that basis.

I: Ok. Can you tell me - what things influence how policy is made? What things might have an influence on how the policy is made - the process - for instance, what things might determine how fast a policy is made or how strict a policy is or...

R: How fast - I guess the urgency of the matter - basically a policy is set up to serve the operation really - I don't know if that answers your question but...

I: Well, here - maybe we'll come back to this later. How do you know when a policy needs to be made or needs to be revised?

R: Well I guess - to be revised if we can't live with it any more - and we see things working better if it is revised.

I: Ok, so in other words - from practice you can tell whether it needs to be revised or not. Ok, what about the case where there is no policy? How do you know when one has to be made?

R: Well, I guess if we feel that we could operate better and more evenly throughout the whole division - if it was covered by policy - then we would make policy on that particular issue.

I: I wonder if you could give me any examples of that - of when you've known for instance that a policy was needed or had to be revised - can you think of an example?

R: Well we have - if I'm right we have policy giving sick leave for teachers and other employees - when an agreement is changed and the days differ, then also the policy is revised accordingly - that would be one area.

I: What things led up to it being revised for instance?

R: Well in the sick leave that - as they are negotiated - then they are put into policy - and in transportation we would basically go the same way - if we felt that from here on in - like our buses are overcrowded right now and we're considering putting into policy that we will not within the half mile - we will not pick up any students - that policy has come about or is being brought into life because of the situation of overcrowding.

I: Ok, essentially what you're saying is that policies are made and revised in response to a problem or something that is not working out - is that correct?

R: Yeah.

I: Again, your views that you hold about how policy is made, when it's made, how it's made, the processes

involved etc., those views that you hold about that, how have you arrived at them?

R: Well, through my experience in the work - in the decisions that you have to make from day to day.

I: Ok, again, this may sound repetitive, but the viewpoint that you hold about how policy is made, does that affect how you approach making policy? In other words the way you understand the policymaking process to work, does that affect how you approach policy?

R: Oh yes.

I: In what way?

R: Well, you know that once you make a policy you try to live by it and that would govern that you would make sure that you would set up policy that can be adhered to.

I: Ok. I wonder if you can tell me in your mind what are the attributes or the elements of a good policy? What are the things that make a policy a good policy?

R: Well, a good policy would have to be drawn up in such a way that it would treat all people evenly - all people concerned - and something that you can live with.

I: Why do you say that?

R: Well because that is what I'm there for as a board member - to see to it that the education system is run in a fair and just manner for everybody concerned - be it students, teachers, whatever.

I: Ok, and how have you arrived at this conclusion - is it something you've learned through experience or is it something you went in with?

R: Well I guess I had that idea before I became a board member and I've been secretary treasurer for the past twenty years before I became a board member - before the school divisions went unitary - that has to have helped me in arriving at how I see the whole operation being run.

I: Ok. I wonder if you could maybe give me an example - or one or two or three examples of a good policy - one that is fair and that you could live with for a long time?

R: Well, again you could go to transportation - I think the policy that we have regarding pick-up is - if we go by distance - that is a policy that is as fair or as near fair as we could wish for a policy to be. And also in the policies that we have regarding teachers' sick leave or maternity leave - I do feel that that is a fair policy, and that it has been set up in such a way that it is - serves the purpose from one year to the next.



I: Ok, I'll go back to something you said earlier about not being carved in stone - do these policies allow you to make exceptions?

R: Oh yes.

I: Do you consider that to be a good attribute?

R: Yes.

I: I was thinking perhaps there would be a crippled child...

R: Oh yeah, that's always there - that's just a normal average student - the exceptional student has exceptional priorities.

I: What do you feel constitutes a bad policy? You told me two or three attributes of a good policy - what things make a policy bad?

R: Well, if a policy is - if you have a policy that does not take into consideration the whole - how it would affect the whole system - if it is - it has to be a policy that treats everybody evenly - and if it doesn't do that, then it is not a - it's a policy that is not good.

I: Anything else that might constitute a bad policy? For instance, supposing a policy treats everybody the same - does that of necessity make it good - I wonder

could you have a policy that treated everybody the same and yet was a bad policy?

R: Yes, I guess you could if you came - if the situation arose where special attention was needed in whatever area and then the policy would be a hindrance - but, like I say, policy is there to serve us and we can always still deviate from the policy.

I: Or indeed change it...

R: Or change it - yes.

I: This may not be a fair question but can you think of any examples of a bad policy?

R: Well, the - we have - for instance, in transportation again, it's a very ticklish area and if you set up a specific mileage limitation on your pick-ups, that can also come back to haunt you and not serve its purpose that it was intended for.

I: But again you can overcome that.

R: Oh yes.

I: Ok. Well, you have opinions about what's good and what's bad policy and I wonder if you can tell me if those views that you hold - about what's good and what's bad policy, if that affects the way you approach policymaking?

R: Oh yes - it would. Actually everybody tries to make something that is positive and work with it.

I: So you strive to put into policy those elements that you have described as good - equality, fairness, that kind of thing.

R: Yes.

I: How do you evaluate policy?

R: Well, if a certain area in your policy creates problems on a continual basis that there is concern with it in whatever area it may be, then you would look at it and see if maybe the policy wasn't the best policy.

I: Ok, how would you reach a conclusion?

R: Well, by studying the situation and see if we could come up with something that could serve it more - could serve it better.

I: Ok, but I gather you don't have a specific measuring stick though. I guess what I'm saying is that part of this would be educated guess work maybe...

R: Yes, well, we look at policy as an ongoing thing. It's not something that you write down and that's it. It's a guideline that you want to stick with but yet, at the same time, it's supposed to serve us to help in a better way to run our affairs.

I: Have you had any particular experiences as a trustee which have shaped your views about policy and policymaking?

R: Yes - I have run up, in my earlier days, with a policy that I felt was not a good policy and that has taught me to be very careful about how policy - how you put things in the policy - something that you can live with.

I: When you say be careful of how you put things in the policy - what do you mean?

R: Well that a year from the time that you put it in there, that it's working against you instead of for you and running your affairs - I feel that whatever you put in the policy should be studied very carefully and how will this work a few years down the road?

I: Have you ever taken any in-service training or gone to any conferences or anything like that - about policy or policymaking or professional development - that has sort of affected the way you think about policy and policymaking?

R: Yes, I have been to some seminars that were sponsored by the MAST association.

I: Ok, and these were specifically on policy?

R: Yes - and we have also, before we revised our policy three years ago, we also had some professional staff

out from our head office to set up guidelines of how we would want to approach policymaking.

I: This research that I'm doing is concerned with trustees and how they think about policy and policymaking. My feeling is that the way trustees think about policy and how policy is made, could affect the final outcome of policy statements. How do you feel about that? Do you think that's an accurate assessment - do you think maybe I'm off base ...

R: Well, it can't be any other way in my estimation - that that's the way it would come out - the way we feel about a certain issue and in that way surely it would affect our policies.

I: What if you view things differently - what if you view policy and policymaking differently than another trustee - what happens there? Will your view and that other person's view be reflected in the final statement?

R: Well, when you're working in a body or a group of people, the majority decision rules. I guess you have to abide by that. At the same time, before you have your input - and trying to come to a compromising sort of way - come to as close to something unanimous as you can.

I: Do you think that this kind of research is worthwhile - trying to find out how trustees think about policy and policymaking?

R: Oh, I think so. I think it would be an advantage to me to read what such a research would come out with from the differing areas of the province - yeah.

I: How would it be of advantage to you?

R: Well, I think it would give me more information and a broader view of how policy are being formulated by differing divisions and thereby being able to gain some knowledge that you could put to use.

I: Ok. Do you feel that the questions that I've asked you tonight - are they appropriate for getting the kind of information that I'm after? In other words, I want to find out how you view policy and policymaking. Are these questions suitable for me to find that out?

R: The questions I don't have a problem with - I would have probably been of more value to you if I would have studied the questions somewhat but - no I think the questions are good.

I: Ok. The last question then - is there anything that you'd like to add that you feel is important to my understanding of how trustees think about policy and policymaking - and which I haven't covered?

R: No, I can't think of anything.

I: In that case, thank you very much for your time. I certainly appreciate it.

R: You're welcome.

TRANSCRIPT # 9

I: The first question that I have then is - can you tell me in your own words, what is policy?

R: I was afraid you were going to ask that. Well now, what do I - well I think that policy is a statement of your - really your philosophy and your approach to education in your division. And, we also have procedures and it is distinguished from procedures which are sort of outlined in job descriptions and...

I: Ok, these are statements - are you referring to written statements?

R: Yes. Yes they are. In our division they're written statements.

I: Ok, can you give me an example or one or two or three examples, if you want, of policies?

R: Well, ok - we have sort of general policies of you know - the type of education that we're giving - but that's sort of like motherhood statements you know - like we're going to give everybody a good education and meet the general needs and the personal needs of the children - but



we have specific policies with regard to transportation you know - distances you're going to transport kids. We have specific policies with regards to our three programs - our types of schools we run - immersion, francais, and English - outlining you know - what the objectives of these programs are and who they're for - and we have policies on teaching religion and things like that in school.

I: You have said that policy is the philosophies, and you differentiated that from procedure...

R: Procedure - yeah we also have a number of procedures which, I would say outline what - they're job descriptions - a lot of them are job descriptions for all the staff level - you know - who they're to report to...

I: When you talked about bussing, you talked about transportation ...

R: Uh huh - but that's a policy really because...

I: Is it also a procedure?

R: Well, yes. We have a procedure - we have a manual for the drivers - but our general policy with regard to students - you know - I guess our policies are probably more with regard to students and the schools and the education and the services we deliver. Whereas procedure, I suppose, would be more - you know - your staff - what you

expect of your staff and how they apply for - if they want time off and things like that - who they apply to etc.

I: And those are distinct from policy?

R: Well, I don't know. We have what we call policy and procedure manual and - you know - in my mind those things are procedures - they're just sort of steps people go through if they want to do things.

I: Are you differentiating between sort of a very broad based - you called it a motherhood statement - and very specific concrete administrative details...

R: Yes.

I: Do you view policy as being in both areas or is it separate and distinct from the administrative area?

R: It's hard to say because - I guess you would say the procedures are also our policies because it's all one manual and it's called a policy and procedure manual and - I guess some are more in terms of general directions and philosophies and others are very specific administrative things - so, but we do have both but we lump them in a one sort of - I differentiate in my mind sort of that one is - policy to me is more philosophy and procedure is more administrative detail.

I: Is there any difference between policy and goals, objectives, and desires?

R: Well, I think so. Goals and objectives are very broad statements, but policy are sort of more a specific - the way you're going to achieve these goals perhaps - in terms of ...

I: So there's a link there but one gives rise to the other - is this what you're saying?

R: Yeah, I think so. I think policy would be more specific.

I: Would it arise from goals and objectives?

R: I think so. I think you have to have long term goals and objectives, and your policies should support these long term, long range goals.

I: Ok. I've asked you what policy is - you've given your impressions and views of what it is - why do you hold these views? Why do you hold these views about what policy is - how has this come about?

R: Well, I guess it's just in my own mind that policies are the same for any organization - for any group that meets - you have policies - whether you are a political party or a school board or just a group of people in an organization - you have certain policies which means sort of

a statement of what you're doing - what you're there for. And of course in school boards - I guess I was familiar with school boards and I knew what some of their policies were so I knew they had policies.

I: Ok, so this hasn't really - has this view of the nature of policy changed at all since you've become a trustee - has it altered in any way?

R: No, I don't think so. No. I think I knew that there were these type of things.

I: Ok. Well, you have a specific view of what policy is. Does that view that you hold affect the way you approach policymaking?

R: Oh yes. I think so, because I think as a board that we have policy statements that the majority agree on, but as an individual I might have policies that don't necessarily agree with the general statement of the board - so I approach policies with my own personal philosophy and try to - you know - bring my own personal view into the whole picture.

I: Ok, and how do you do that?

R: Well, whenever - well the policy's in front of us and if there's something in there that I disapprove of or disagree with, I just say "Why do we have to have this? I

don't think that's good." Sometimes others will support you and sometimes they won't, but that's about really all you can do - you know - you just present your arguments why you think that's particularly good or why it's not.

I: Do you ever have the feeling that some things - because you differentiate between administration and philosophy - do you ever feel that, for instance, you don't want certain administrative things into policy - you'd rather not deal with that as policy - but rather as procedure - is that ever a conflict with you?

R: No, I don't think so - I don't distinguish - you know, if we're setting out something that's an administrative procedure or policy - I don't think so - I feel more comfortable if things are written down so people understand what's expected of them and I think it's more fair to your staff too for the board to take that responsibility of writing it down so that you can't go back to them and say "Why are you doing this?" - you know - No, I feel comfortable with having things put into - Just as a point in comment - at our last board meeting we were discussing adopting - the superintendent had presented us - we'd asked him to study the guidance counselling issue in the division and he had presented us with a rather broad statement of policy regarding counselling in the division - the needs and how it should be set up and organized - and - you know -

obviously I think he wanted us to pass it at that meeting - and I remember board members were - for one reason or another, uncomfortable with it and didn't want it to go through that night so they just said that they'd think about it until the next meeting - which is sometimes deferring it but - you know, I think it - in a situation like that it's good to have things written down so that people know what you want done.

I: Do you think policy is necessary?

R: Yes - I guess so - I think so - yes.

I: Why?

R: Well because all kinds of situations arise and you have to - if you haven't got a policy you're just - everything is an ad hoc decision - you make a decision about something one day and then another board comes along or another - you know - you make a decision a year or two later and it might be in conflict with the first decision - policy enables you to kind of treat everybody the same. If you say "Ok, we're going to do it this way - only certain people get sent out of the division for certain programs - we have certain guidelines for who gets sent to vocational school and who doesn't ..." If somebody says to you "Why can't my kid go to that school" and you say "Well, this is the policy" - I think you do have that.

I: So it serves a...

R: I think it serves a utilitarian - and also I think - well it's nice to have a philosophy and a - and you should have broad educational goals - I'm not sure that we really do have, but we should have.

I: Ok. Has your opinion changed at all with regard to the necessity of having policy?

R: No, I think it's just been strengthened really because of the situations that arise - situations have arisen where we didn't have a policy and we got into trouble and we had to write a policy - and I would say the situation with the guidance counsellors is one - and then there was another situation with our staff - you know - our bus drivers and that who had been used to doing things a certain way year after year and there was no written policy - and - you know - a few tricky situations arose and so we sat down and wrote a policy. And policies about other things - things come up - things change - like we had to write a policy for administering medications to students at school - which we didn't have before - and other things - and then policies change - you know - new situations arises - so yes you do have to have - I think it's very important - new policies are important.

I: Ok. Feeling as you do about how important policies are - does that affect the way you approach policy-making?

R: Well, yes - I guess I'm always in favor of - if the superintendent wants - you know - a policy on so - yeah, you know - some other trustees I think sometimes don't like to see things written down - because once it's written down - you know - then you can't - it's a little more difficult to change it, but no I think I like to study things and see them in writing.

I: You mentioned the superintendent - if he wants a policy - that you like to go with that - are there other ways - besides the superintendent wanting a policy - are there other ways that policies come about?

R: Oh yes. In my experience - we haven't written that many new ones because I think we have - you know - a basic set and - but - generally if we're talking about something and we say - in all the ones I mentioned to you that we did write - we sort of threw it to the superintendent and said - you know - shouldn't we have a policy - and then he brings it back - he looks at it from the division point and the teaching point - Uh - do we write it any other way - well, we have a liaison committee that can recommend policy and it's a committee of trustees and teachers - and basically I guess that's the two ways that they come about. I



suppose I could sit down and write a policy out and present it at a meeting if I wanted. I just don't feel that capable of doing it because I don't have the expertise to know what's needed in the schools so - I really think it's the superintendent's job to - you know - research it - he researches what other divisions are doing in the area and MAST - and he talks it over with the principals - and then he comes back to us with it and then we have our input.

I: You've talked a lot about writing down policies in the policy manual - the policy and procedure manual - should policies be written down?

R: Oh I think so - otherwise, how do you know what they are? I mean everybody may have a different concept in their mind of what it is if it's not written down - I know there's a danger when you write things down, but they can always be changed and improved - it's not a - if you make a mistake or if the next board doesn't like certain wordings and that, you can always change it. We have to change our policies from time to time.

I: Ok, in your own experience, thinking about policy, does policy ever exist without being written down?

R: I'm sure it does - I'm sure that it exists for the superintendent and staff, but boards are constantly changing and perhaps aren't - but if you have the superin-

tendent and the principals have been doing things a certain way for a long time - I'm sure there are certain things that exist.

I: So you're saying that precedent is really policy in a sense?

R: Yeah. I guess so, yeah - you know - for instance if something comes up and we'll say to the - you know - invariably ask the superintendent "Has this happened before and how have you dealt with it?" - so precedent is quite important and very often we say things like "Well, we don't want to set a precedent." If it's something new like sending a teacher on some type of - like one teacher wanted to go and do something that was overseas - you know - and previously we'd never had anybody do anything that was overseas and - you know - there was some discussion about setting a precedent - you know couldn't he do this particular course - with this particular lady - couldn't she do it in Canada - and the answer was yes, she could do the same thing in Canada - so why does she have to do it somewhere else? So, you know, precedent is a big factor. Because I'm sure that there was a time when there wasn't a policy written down and policies have probably evolved out of the way things have been done in the division.

I: Well, you've said that you like to see things written down - that there may perhaps be some things that

aren't written down - are there any advantages to writing things down or not writing things down - you've given me some to writing them down, are there perhaps any to not writing them down?

R: They're easier to change - you know - but other than that - no, I think it's better to have it written down.

I: Ok, if it's to be written down, in your mind, how should it be organized? Is there any specific way that it should be organized, who should have access to it?

R: Well, everyone should have access to it, and it should be for the public and staff certainly. Well for staff, it's obligatory - I don't know if they do, but they're supposed to read the whole manual - and certainly the public should have - so that they have an idea of what the philosophy of the division is and what - how it should be organized.

I: I gather that what you're saying is that it should be in a discrete manual and that you know where to go for it and possibly it should be catalogued under various headings ...

R: That's right - uh huh.

I: Ok. Who makes school division policy?

R: I suppose I should say trustees do but - well, I guess we do - we certainly can change it and I guess over the years the trustees have at least approved it. I would say probably the administration has detailed it, but trustees have approved it. And I think sometimes - as I say - sometimes the suggestion for a policy does come from the board - that we need a policy in that way - and sometimes it comes from the superintendent - that we should have a policy in this manner because he's not sure about how we want him to deal with it.

I: Ok - the actual construction of the policy statement itself - who makes that?

R: I would say the superintendent - you mean the writing out of it and the detailing it - well, our superintendent does and we then go through it.

I: Do you have a role in modifying it?

R: Yes. Yes.

I: Does it ever happen the other way around when you might present a written out policy and the superintendent might modify it?

R: We've never done that, but I'm sure it could be done if we wanted to.

I: Alright - you have said that school boards make school division policy - but really sometimes the superintendent makes it and you approve it...

R: Approve it - yeah, I have a feeling that sometimes that happens but, he wouldn't obviously present a policy that he didn't think - you know - that we weren't asking questions about - you know - he doesn't just dream up policy - it comes about as a result of problems or direct requests - so - and I think that really is - you know - he's the expert and he's the one that can be in touch with other people.

I: Does it ever happen that policies may come about or be made by other people - perhaps the teachers' group - perhaps members of the public - perhaps pressure groups - perhaps students...

R: Well they can be changed by these groups - you know - like we may adopt a policy and certainly groups might not like it and can make representations to have you change - but I think we're probably as susceptible as anyone to pressure groups.

I: So in other words, there are a number of groups of people who have input into the policymaking process?

R: Yeah, unfortunately - well teachers should have input beforehand because the superintendent by rights should really - I think he does - consults not only the association - the principals' and the teachers' association to - you know - to get their reaction to policy before we pass it - and so they do have input into it. The public - not really unless it's something that we would specifically go out and try and get public reaction to - but I think that we're the public - you know - we're supposed to be the public so you can't always be running back and saying to people "What do you think of this policy?" - unless it's very very major - then you might want to hold meetings and get - you know - public input.

I: You say there's input then from a large number of groups - or can be - there's room for it I gather...

R: I hope there is anyway...

I: What, if any, limitations do you put on this? In other words, how much input should these various groups or people have in making policy?

R: Oh, as much as they want - you know - if they have good points to make I think they should have - I certainly think staff have a large say in policy because it directly affects them - you know - most of our policy is carried out by staff members, and if we're making some high

'falutin' statements and - or demands that they feel are just not - they're not able to carry out or are just not logical, then I think they should have a good deal of opportunity to present their - and as far as parents go, well - you know - I would say probably the majority of parents don't really know what our policies are. The only times they're affected is if we change our policies with regard to staffing - then they can become affected and of course, that's a very direct - a direct impact on their child or their child's grade or - you know - if they adopt a policy to change your schools or something major like that, then - you know - parents should be consulted before you make a major change like that - but a lot of our policies are - so many of them are housekeeping procedures that direct more or less directly affect staff and things in the school.

I: Ok. Given that you have this consultative kind of a role that's played with superintendent, teachers' group, perhaps parents and specific interest groups - what is the role of the individual trustee then - not the group - the individual trustee in the policymaking process?

R: Well, I guess I look upon my role as - you know - I'm a parent and I'm not familiar with the teaching in the classroom - so I'm not an expert in education - and I look upon my role as being bringing that point of view into the policy. I don't try to critique policies in terms of

their educational value. If the superintendent recommends something, I'm pretty well prepared to listen to him because - unless I know something directly opposite, I feel he should be responsible for that - but there is - you know - how this policy is - well for one thing - how much does it cost? That's a very important - if you're making changes and very often policies do involve costs - you have to be prepared to support certain costs - and you have to know what your area will support in terms of costs and how they want that money spent on these certain programs if you're initiating the programs. And just a general parental viewpoint - if you know - I tend to figure that's my role.

I: Can you give me an example of a policy that's been made by input from various groups?

R: Well, we had a policy come out of the liaison committee last year with regard to principals - with regard to how many principals we should assign. We've got a wide variety of schools and programs - and some are big and some are small - and we've got schools with one program - two programs - three programs - and it's really very complex - and one of the trustees had wanted to change the organization of principals and so they studied it and it went through the teachers' representatives on the committee and the trustees' representatives - and they studied it for a number of months and came up with a policy with regard to -



you know - .5 principals for so many students and etc., etc.  
- and then I think that this was also presented to the  
parents' committees at the schools - some of the schools  
involved were multi-program schools - so that policy came  
out and was adopted because of that.

I: So there was input then from several groups in  
that particular instance?

R: Yeah. I can't think of too many that have  
gone through maybe all three groups, but most of them come  
from the principals and the association - like you know -  
the superintendent, I'm positive, goes back to the schools  
and gets the input from - if - at least the principals and  
the principals should in turn get input from the teachers, I  
would hope.

I: Ok. Has your view of who makes policy - has  
that changed from the time that you first became a trustee -  
has that changed at all?

R: Well, no. I think not. I had a vague idea of  
what it was and so - yeah I think - it's pretty much the  
same.

I: So if anything, it's been reinforced then?

R: Yeah, I think so - it's pretty much as I  
thought things probably happened.

I: Ok. Again, the view that you have about who makes policy - does that affect the way in which you approach policymaking?

R: No. No, I don't think so - I approach it pretty much - I'm a very basic person - I just approach things and I look at them and - you know - either I - they make sense and the arguments make sense or they don't make sense.

I: Well now I want to ask you how policies are made. I think you may have answered some of that but, specifically, what are the processes or procedures - the steps if you like - that are gone through from beginning to end to form a policy?

R: Well, I think first of all you have to have - policies I think are made in response to situations - as I say we're not sitting around saying "Oh we haven't got a policy about this." - I mean something comes up in a school or a parent or with a child or - it's a program - and it's sort of never come up before - or it's maybe come up once or twice...

I: When you say something comes up, are you referring to...

R: A problem... Well, a decision has to be made - let's put it that way - we have to make a decision about

something and - it may be the first time that this particular problem has arisen in the division - or else, as with medications, it was happening but there was no specific policy on who was to give them and - you know - anything like this - and you know - do they have consent forms from the parents and all this thing - you know - so these things - times change and things come up and so I guess the first thing is that there's a decision that has to be made - and we don't have a policy to guide us - therefore, we start looking at the possibility - is this decision going to be repeated or is it a one time only - I mean, if we're not going to repeat it, there's no point in writing a whole policy for one decision - but if it's something that's re-occurring and it's going to occur again, then we need to write a policy about it - so that I guess that's your first step. Your second step is you throw it into the superintendent's lap and say "Ok, write up a policy." - and he does the research - as I say, he contacts other divisions to see if they have policies - he gets their policies and reads them and he, I guess, goes back to the teachers and - if it's something that involves parents' groups - we do have - a number of our schools have organized parents - if they don't have an organized parents' council, there's really - it's very difficult to consult parents on these things but, where we do have organized parents' councils these things are - you know - they're made aware of these policy state-

ments and they have an opportunity - they always have an opportunity to speak at a board meeting before it's adopted if they wish to present a delegation on it.

I: Ok, after the research what happens?

R: Well, it's written up and it's presented to us and we can then adopt it or think about it.

I: What's written up?

R: The statement - the steps - you know - the policy that we want.

I: Ok, does that mean that the superintendent then does an evaluation and discards what's not good?

R: Right. Yeah. We don't have a committee - he pretty well does that and the assistant - he has an assistant - so I suppose that the two of them would go through - you know - what other divisions have done - which is - you know - I suppose fairly common - or else if nobody's done it, then they have to start from scratch.

I: Ok, so when it gets to the board level, it's still not policy until you adopt it, right?

R: Not officially, no.

I: Not officially?

R: Well, it probably isn't even unofficially - I don't know - I mean - they may have unofficial policies that we don't know about - you know - I mean the staff might - but no, the board has to pass it.

I: Ok. On what basis does the board pass it?

R: Well ...

I: Or for that matter reject it?

R: Reject it - well I guess on personal - you know - your own personal feeling about it. Is this necessary - is this going to be of value - or is it going to be a pain in the neck if we write this out and it's going to have to be followed - is it going to be more - you know - like I tended to feel with the rather detailed policy on the counsellors - you know - this is my own personal feeling that some trustees sort of - because some trustees had wanted a year earlier to cut back - they were not quite willing to adopt this policy because they might say that - well the staff would use it to say "We need more counsellors in the division." - because - you know - it set out some philosophy about counselling and how we believed in it and all that and maybe some thought "Well, I'm not going to adopt that because I'm not sure I believe in it." Consequently it was just put on the back burner - put on hold - so that's right - it's your own - then it gets down to the trustee's own

experience and personal feelings about things - and costs - I would say costs - if it doesn't cost much and if it isn't going to create any political backlash - then probably it'll get passed but , either of those two factors could weigh heavily in policy.

I: I gather that what you're saying is that the way the trustee feels about it significantly influences the outcome of the policy statement.

R: Yeah, I think so - oh yeah, I think the trustees - you see, school boards are funny things you see - like our school board has eight individuals - there's no group there that ever ran together and has a philosophy or a - like a political party - so you've got eight people there and they might all have different approaches to this - whatever - like we also changed our policy on outdoor education - you know - and there was some trustees that just - you know - dead against overnight trips - now we had great arguments about that because some of us were quite vocally for them and others were "No, we're not going to have them." So eventually we compromised - I mean we threw out some and kept some and we compromised - We just said "Some are ok, and some aren't." So, I guess there's room in there for compromise too in terms of your policy. So I guess that's what happens at the board level - when it gets back to us we have to...

I: You've mentioned on a couple of occasions now that finance seems to be influential in determining policy - what policies will be passed and which ones won't - I wonder what other kinds of things would influence how policy is made.

R: Well - political - whether they feel it's politically palatable to them - to the people in their area - or whether they feel that this is something the parents would not want - like the overnight trip - one trustee in one area was adamant that the parents simply did not want this and they made a point of telling him that they did not feel this was necessary - so, in that case, it was not a - you know - there was no hard and fast evidence that these trips were good or bad - I think generally speaking, most of them were good - but there was just this feeling among parents that this is not what we want.

I: Ok, so the most influential things then would be politics and finance?

R: Yeah - I think finance would be the first one - you know - if this particular policy is going to cost money, then - you know - you've got to have a doubly - you take a look at it - if it's going to save money, well no problem but if it's going to cost money, it has to be - you know - you have to be...

I: You have to be convinced?

R: Yes - they'll have to be - some of them will have to be really convinced of this - that it is really necessary.

I: Ok. How do you know when a policy needs to be made or needs to be revised?

R: Well, I guess you know when it needs to be made if a situation keeps re-occurring and you have to - either your staff can tell you or you can decide yourself that you have no set policy in this area - and revised - well, they have to be revised when - when situations change - I figure - in society situations change.

I: Can you give me an example maybe of a policy that would have to be changed?

R: Well, the ones in our area that have had to be changed are the overnight one and most of the others have had to do with finance. You know, we have policies - I guess you could say they're policies because you adopt certain guidelines for staffing schools - and when you change those guidelines - you know - as in counsellors or something - you know - it's a financial thing - and we change transportation policies for financial reasons - and you know, those were policy changes that came about because of finances - changes in finance - and so those have been the biggest ones. Other changes have just been - you know -



really minor ones - perhaps just additions to policy to cover certain situations that were not included before.

I: So, in other words, when you find that a policy isn't working the way you need it to work, you then also go about changing it?

R: Yeah. You can add or you can delete - you know - sections that - you know - you can't afford them any more or - you know - we used to let the communities have free use of buses and transport kids to swimming and all - you know - all kinds of nice things that we had to eliminate. They all required changes because these were all set out in policies - and they were set out because people were always asking for - couldn't we have a bus - you know - so you have to decide who gets buses - now we have to decide how much they have to pay if they do use it and what costs and things like that.

I: These views that you have about policymaking - how it's done and what the processes are, and everything, - how have you come to arrive at those conclusions?

R: Well, just by my experience on the board - I mean I had, maybe a vague idea before but it's really just sitting there and dealing with things that - and talking to other trustees - you know - meeting other trustees you share experiences with them too.

I: Ok. This viewpoint about how policy is made - does that affect the way you approach policymaking?

R: Yeah, I guess it does because I don't initiate - only once or twice - I've suggested that we didn't have a policy - like I would attend a conference and they'd be discussing something and I'd go back and say "Do we have a policy on this matter?" Or do we have a policy advising our teachers on what to look for and what to do and things like that - you know - we didn't have a written policy but there was a procedure for teachers to follow which was fairly clear.

I: Was it a written procedure?

R: I don't think it's written because it's set out in the Child Welfare Act and the superintendent outlined to me the steps that were taken in the schools - but I don't think it's written up and I don't know why it isn't written up except - I felt - it was obligatory under the act.

I: What are the attributes, or the elements of a good policy? What is it that characterizes a good policy?

R: I think it has to be directed towards the needs of some particular group - you know - like it has to be in response to either a need of the teachers or a need of the students - and it has to be fair to everybody - it has to be kind of just - you shouldn't try to favor one group

over another or - you know - just favor one area over another. It has to be sound educationally - you know - like it has to make sense as far as improving education goes. Also it has to be somewhat in tune with what the parents think - but I guess that's sort of the trustees' jobs in that they're supposed to represent the views of the parents. I mean there's no point in making policies that are so far in advance of what the parents - the people are thinking that they won't accept it because - you know - acceptance is - it has to be implemented so - you know - for instance, the staff has to - if you make a policy and it's in direct - directly opposite to what the teachers or the superintendent has recommended - you're just asking for trouble. So it has to be acceptable to the people who have to work with it - and it has to be affordable - finances are important.

I: Ok. Maybe the converse - maybe you could give me the other side of the coin - what characterizes a bad policy?

R: Well, I would say it was a bad policy if you write a policy that doesn't - that the superintendent and the staff are really kind of - recommend against in terms of - and it's also bad policy I think if you make a change - uh - maybe not bad policy - I was going to say if you make a change to save money and it's violently opposed by the parents - it's bad policy in that even if it's right, it

won't work because if the parents don't want it to work, you've got to have a certain amount of co-operation there - so in a way it has to be politically viable - politically acceptable by the parents and the staff so if it causes a lot of conflict in either area, I think you should probably look at it again and see if this is really really necessary - either the financial savings or the policy itself. Sometimes they are - you know - sometimes you just - in spite of these oppositions you have to make a judgement as to whether you can afford to spend this money or not - and you have to face the flak but - really, it's not good policy if it upsets people because it really doesn't - I don't think it does much for the educational system when everybody gets up in a flap about something.

I: Ok, I wonder if you can give me an example of a good policy as opposed to a bad policy?

R: Well, I suppose a good policy, it seems to me, was when we studied our principals in our schools and did make some effort to give some support and break up the programs in the schools into separate administration - this seemed - you know - it was studied and it seemed to be acceptable to the teachers and the principals and to those parent groups that were involved - it was - they agreed - so this to me was a good policy. It went through and I think it's constructive. But a bad policy was say when we cut -

changed the formula for counselling and it was not studied by anybody. It was just brought forth by a trustee and adopted at a budget meeting as a financial measure and it created - it caused absolutely terrible flak from the teachers and the parents and we eventually rescinded it. So - you know - that is what I would call bad policy - when you don't really study something beforehand and get this input and evaluate the arguments - because...

I: Ok. Well, how do you evaluate policy?

R: Well, that's just like everything. You listen to the points - it's a question of people presenting points for or against it and if you hear a lot of good points against something, and not too many good points in favor of it, then you have to ask yourself if it's a good policy.

I: Ok, but I gather from what you're saying that this is slightly intuitive now?

R: Yeah, I guess so.

I: You don't have a yardstick against which you can measure whether it's good or not?

R: Well I don't. I think everybody - you know - I think the superintendent would look at it from one point of view and the teachers - and they would say to us "Oh, this policy is ridiculous." They would have certain things

that they would point out to you that would involve the classroom situation and then you might - from your own personal perspective as a parent - you would have viewpoints too as to - you might want something that the teachers - you might say "I want more discipline and I want the strap and I want all this" and the teachers might say "Forget it. That's not the way things are done these days." And you have to listen to them - you know - you have to listen to them and they have to listen to what parents are wanting too.

I: In a case like that where there is conflict between various points of view, and you have to make the decision, - how do you make that final decision?

R: Well, I guess that's your own personal choice - you balance things out and I think basically, you're there to represent parents - and if it's a decision that you feel people feel very strongly about, you should try to persuade the teachers as to why the parents want this particular thing - or you have to sometimes persuade other trustees as to why they want it.

I: So you have to negate your own feelings then?

R: Yeah, I think that you have to - within yourself - you have to have some background of experience and philosophy to make some of these judgements - especially in

situations of conflict - you have to have some own personal feeling about things because otherwise - I know there's one trustee on our board that's - you know - he's a bit younger than I am and this is his first term - it's my first term too but I mean he's forever making decisions and then sort of saying "Well in hindsight, maybe we shouldn't have done that." But, I think you have to have a little bit better than hindsight - you have to have a little bit of foresight too - and it helps, I think - I know from my point of view, it helps that I've had five children go through school and I've been in the community a long time and I know the community well so I know - you know - it helps if you know your community and you know the situation and you know where people are coming from and where they stand - because some of them - you know - to be perfectly honest - some of them are a little bit political. You might be undecided - torn between two groups - but you have to - you know - you might go for what the parents want because you feel that my obligation is to represent them - even though you might think the teachers are - you know - that if it's a conflict between that way - but generally in our area I haven't found it to be a conflict between parents and teachers - it's a conflict between the parents and the board - you know - the policy of the board and not so much the policy of the school.

I: Your ideas or your views about what makes good policy - what makes bad policy - does that affect your approach to policymaking?

R: Yes, I think so.

I: In what way?

R: Well, I don't - if I think a policy is - if we're making a policy change and we have lots of groups speaking against it, then I think we should put it on hold and study it - you know - make sure that this is really necessary. I don't think you should pass something that really gets one group or another group really up-tight because - as I say, even if you're right, it doesn't do anything for the educational system. I think it's better to wait a while and - you know - let the arguments gel and maybe - you know - and people sometimes change their opinion or else you find that it has to be passed and then you make a decision - but it gives you more time to think about it and to reflect about it - so I think it affects me because I'm maybe a peacemaker - I don't know, but I don't like confrontation situations in education.

I: Ok. Have you had any particular experiences as a trustee which have shaped your views about policy?

R: Oh yeah - lots.

I: Can you describe some of them?



R: Well, our division has been - particularly our board has been just nothing but conflict over certain policies and it's really upset the whole division - it's upset teachers, it's upset parents - you know - I have no doubt - and it doesn't matter what we do now, people are so suspicious that they react to everything - you know - just a simple little thing like trying to adopt a policy for boardroom procedures which we finally had to adopt because we had so many delegations coming - you know - I thought it was a very innocent document - well we had parent groups come down and rail at us about these procedures - how they were designed to stop the parents from coming to speak to us - I mean it doesn't matter what we do - we're suspect in the eyes of both groups. And, I think that's just unfortunate - you might want to - you have to make changes - you can't just do nothing - so, our whole approach to policymaking has been one of confrontation - making the policy without adequate consultation with groups of teachers or parents.

I: And so you find that you've changed now?

R: Have they changed - I really don't think so.

I: They don't consult more?

R: Well, I would, but I'm not in the majority so - you know - on a board there's a majority group even though there is no political party, sometimes there's very defi-

nitely a majority group, and as a matter of fact - I think what has happened is that some board members have become almost - closed their ears to any groups that do speak to us - either teachers or parents - because they just feel they're orchestrated pressure groups and they don't really represent the views of parents or teachers. I would say that it has had a very detrimental effect on our board and on our - I know it's had a bad effect on our teachers because I've talked to teachers and they're quite - I think - depressed and they're just hoping for a new board in October or a change in some board members - and I know parents are very upset right now about things so...

I: Ok. This research that I'm doing is concerned with how trustees think about policy and policymaking. Now it's my feeling that the way trustees think about policy and policymaking could be influential in determining the kinds of policy statements that arise. I just wondered if you had any opinions about that?

R: Yeah, I think so - I think so because if you take me - and I believe in a consultative approach and a compromise I guess I would say - you know - I'm not one of these people that well - it's going to be done my way and that's it - I believe that you try to bring in the groups involved and get their viewpoints and you try to arrive - nobody can always get their way - you try to arrive at a

compromise situation - and also between your trustees and administration because - you know - what they want is not always what you feel you can afford - but you have to listen to them and they have to listen to you and you try to find a middle way - if you do this with respect for each other, then I feel that you can make progress.

I: So what you're saying is that because that's the way you feel about it - that's the way you think about policy and policymaking - that you will actively try to bring that kind of a policy statement about - one that may be compromising in nature but at least goes part way towards resolving the difficulty etc.

R: Yeah, you know, I think I feel strongly that to bring in policies that are violently opposed - or to bring in policies that haven't been adequately researched and studied is not really terribly constructive. Because these hostilities - I don't know - they last for a long time in the minds of people - they remember it for years.

I: Ok. Do you think that this kind of research that I'm doing - trying to find out how trustees think about policy and policymaking - is that worthwhile research?

R: Oh, I think so. I think that research into how school boards function- I think it might be helpful in determining - I don't know - how maybe school boards could

function better. If your research - I don't know what the end results might be - but if it could persuade trustees and make them aware of how policies are - how people feel about it - and how they come about - I guess it's useful. I think all research is useful - I don't know - school boards are sort of - there's always a question being raised as to - are school boards really necessary - are they beneficial or should they somehow be done away with and since the province pays - you know - 85 or 80% of the money - could they not just appoint a board to administer the whole province - you know - and so I think that policy could show that trustees - there's a very individual approach in school divisions and that this is important in making policy.

I: The kinds of questions that you've answered - do you think they're suitable for getting at the kind of information that I'm trying to find out?

R: Yes, except that - you know - when I was thinking about policy and trying to - in my own mind trying to figure what policy was and what - you know - to distinguish policy from finance - because most of our debates are financial - but of course they affect the policy too because they affect the education - the staffing - I mean you can have all the beautiful policies in the world, but if you don't put any money behind it, what good are they? So, I would have to say policies are important to have things

written down, but the policies that concern staffing are probably the most important - this is probably the biggest reflection that you'll have about how trustees feel about education - do they put their money where their mouth is? Are they willing to back up their fine statements with staffing? If you don't, they're just motherhood statements that don't mean anything. So, I would say policies are secondary to the whole issue of finances and - you know - in the school system.

I: Ok. The questions that I've asked you today - do you think they are good questions for letting me find out how you view policy and policymaking?

R: Yes, I think they have been - yes - I can't think of anything that I haven't told you about - I think we've covered pretty well...

I: That leads to my next question - is there anything that you feel we haven't covered and that you'd like to add - if so, by all means go ahead.

R: No, - if I were from another division, you might get a completely different story. It's just that our division has been in a turmoil ever since I joined the board almost - right from the first there's been conflict with either parent groups or teacher groups and these conflicts have all arisen out of changes of policy. I just feel very

badly that some of the change is money, but on the other hand, they've created such conflicts that I just wonder if it's worth - well I guess that's politics!

I: Well thank you very much for your time. I certainly do appreciate it.

R: Oh. You're very welcome.

TRANSCRIPT # 10

I: The first question I have then is - to your way of thinking, what is policy?

R: Policy for a school division is, I suppose, a set of rules that the division board sets out for itself - the written policy is an indication to other segments of the education community and also to the public, of the particular directions for that school board.

I: Ok. You've used two words that I wonder if they are at cross-purposes. You've called these rules and then you mentioned the word guidelines. Can you clarify that for me?

R: Well, when I say rules I'm suggesting here that a policy manual is in place at that particular moment - a rule that would be followed by the board or by those people that are administrating school board business - policy is set strictly by the school board - it can be changed if - at any given point and simply by motion the board may decide to take a slightly different direction on a particular issue and present a policy - by notice of motion - at least in our board - the policy can be changed in a

relatively short period of time - the period between two meetings.

I: So what you're saying is that when it's in place, it's actually rather stringent rule, but coming into place provides latitude - and it can be moved out of place if need be, and that's where the guideline concept comes in?

R: Yes.

I: Ok. I wonder - can you give me an example of a policy - something that would be a policy?

R: Well, the one that comes first to mind for me personally is one that we're wrestling with in our own division and that's the policy on the community use of schools. More specifically, whether or not we'll allow the use of alcoholic beverages in our schools - it creates some concern for our school division. It is a rural area, and in many of the communities the school is the optimum facility that's available for large gatherings and so on. It's a difficult situation in as much as some communities - there are other facilities that are available. It's difficult for me.

I: Do you have a specific policy now in that regard?

R: We do, but it's one that seems to be under constant discussion because every time there's a request, we wonder what section of the policy it fits into.



I: We'll probably talk about that kind of problem later on. Right now, could you tell me is there any difference between policy and goals or objectives or desires?

R: I would think that the - as I said earlier - that policy generally sets out goals and desires in the school division, but they tend to be more likely to be motherhood statements than conditions because they're very concerned about the quality of education available to their children - and they make every effort to see that the best possible facilities and staff are available. All these things are set out in the policy manual and I guess what I'm saying is that there are two different parts to the policy manual - one that tends to set out goals in a broad general way - in more specific areas - conduct on bus routes for example - where we expect the children to be in the charge of the bus driver - there are specific directions set out in policy. I guess within an entire policy manual it covers both.

I: Do you consider those broad general statements that you talk about as being policy statements?

R: If they are in the policy manual...

I: Has your view about the nature of policy - has that changed over time - say since you first became a trustee?

R: I would say yes - that there has been a considerable change in as much as - when I first got on the board, they didn't have a policy manual - since then it's been developed, and I think most school divisions have gone through that procedure - to develop a policy manual and to periodically review it - and to see that it's in line with the current thinking of the board. And like all things that you do, the more often you do it or do it again, you're more inclined or more likely to do a better job the second time around - which is of course influenced by changing factors as well.

I: And what kind of factors?

R: Changing society I suppose - speaking in pretty general terms again, but I would suggest that looking back over a period of time that if people are being elected to school boards as trustees - tend to have a different viewpoint than took place in the past - those viewpoints, of course, are reflected in the changes in policy.

I: Ok. The view that you hold about the nature of policy - does that affect the way you approach policy-making as a trustee?

R: I don't think I understand the question.

I: You have definite ideas about what policy is or what it should be - does that affect how you approach policymaking - those ideas that you hold about policy?

R: Well, I don't know as I've ever thought about that - I would naturally assume that the answer would be yes - whatever views you hold tends to influence your approach to any problem.

I: Well, you've said for instance, that these are pretty stringent rules when they're in place, so in that sense they are guidelines - does this then make you prone to approaching policymaking with a view to making rules or anything like that? Does that come to mind at all?

R: I would think my attitude when we're talking about stringent rules, would be not so much for the information of the board but rather for the people that are administering the policy - at some time in the past this has been set out as a way to respond to a given situation, so that rather than taking every problem that arises to a board meeting, there's a policy in place that addresses that particular situation.

I: Do you think policy is necessary?

R: I'm becoming more and more a believer in the school division's having policy provided that it's flexible - you know - it can become enshrined in stone, if you like - because of the wisdom of some past board setting a particular policy in place does not mean that - as I said a moment ago - the changing times or changing situations shouldn't change that.

I: Ok, but why are you saying you're in favor of boards having good policy - and we'll get on to that question of "good" policy - but why are you in favor, or why do you see the necessity of boards having good policies?

R: Well, the first value of the exercise is to focus the board's thinking on broader aspects that we were referring to earlier on - educational goals and those kinds of things - and secondly, as I said a couple of moments ago, policy in place is much simpler for the administrators to respond to a given situation.

I: So it has a very functional purpose then?

R: Oh yes.

I: Can you give me an example of that - where its necessity is obvious?

R: Well, the first one that comes to mind is the one you referred to a moment ago - about the community use of schools - the number of requests that come forward for the use of the schools and a principal in an individual school who has the policy of the school board in front of him has no need to carry it beyond that - if somebody requests it the policy is laid out throughout the school division - and he can respond to those requests.

I: So it sort of eases the machinery?

R: Uh huh.

I: Ok. You said that more and more you've developed this feeling - I'm assuming then, that that's changed from an earlier period where you didn't view policy as all that necessary. Is that true?

R: Well, this is a personal viewpoint and I'm sure you'll appreciate that. Yes it's changed. I would guess that Roy White was probably the first person that suggested to our board that we should have a policy manual in place.

I: What are the kinds of things that have caused this change in your own mind?

R: Probably the fact that we now have one in place and have seen it in operation - one of the factors - and each year it seems to become more and more complicated in the administration of education. When I first came onto our local board we had the secretary-treasurer in that original division board - was the place for high schools - and that was the only staff person that was in the office - and of course this - first thing that happened was the superintendent was employed - and since then we've added two or three people in - as resource people in the office and assistant superintendent - co-ordinator of transportation and the list goes on and on - so the need has developed I

guess for this thing to be in place. It's gone beyond one person sitting with their fingers in everything going on.

I: It's an expansion thing then.

R: That's right.

I: Ok. The opinion that you have now about policy being necessary and desirable - does that affect your approach to policymaking when you come to the board?

R: I think that it would be obvious that it would. If you think something is more desirable than the past, then you take it a little bit more seriously.

I: You make an active effort to get good policy?

R: That's right.

I: You talked several times about a policy manual - I just wonder, should policies be written down?

R: Well, unless they are written down - the only way a policy is put into place is through motion of the board which is written down in the minutes - so why wouldn't you write them down?

I: Well, you've said that the only time a policy is in place is through motion of the board - and maybe I'm wrong, but I wonder if that's a good legal definition? Are there perhaps policies that are not clearly specified

and written down , but are in fact policies that are in place?

R: You'd have to give me an example of that - you may be right but I can't think of an example.

I: Ok, I think of an example - it may not be written anywhere in the policy manual or in a policy statement or in board minutes that it would be the accepted practice in the division to give first chance for employment to local candidates as opposed to external candidates. Might that be viewed as a policy?

R: Well, I would say no - if it's a conscious decision of the board that that kind of thing was - we might take those kinds of things into consideration and - you can look at the tendering practice which might be a better example - particularly for a rural board - conscious of the rural business man and the necessity to deal locally, if you like - I don't think that unless that policy was written down that our board at least would make a decision based on - well let me come at it the other way - I don't think that they would adopt that kind of policy in writing because of the variable aspects of it. I'm a little vague on that because that, in fact, is to a degree - and I guess this is what you're saying - is to a degree a policy in our division in as much as the people who set on the board are conscious of buying locally - that option is open but at the same

time, it's just something that's part of the decision making process when we tender and award.

I: So you're saying it's not a policy as such although it may be a common practice.

R: Well, it's not a policy that's written down - again using the same example, I suppose, we could write down a policy that said that in so far as is practicable we would buy all our supplies from local suppliers. Right away you have - it becomes a motherhood statement which doesn't mean anything because you make those decisions...

I: That's interesting - would you say that policies like that - if you can call them that loosely - policies like local tendering practices are not written down when it becomes obvious that to write them down would either pose problems or result in motherhood statements? Is that a fair statement?

R: Yes. The point I'm trying to make is that there isn't any point in writing them down if, on each occasion - in this case a tender for supplies is considered - you're going to look at the tender on its own merits.

I: Ok. You've mentioned the policy being organized and written down. If it should be written down as you suggest, how should it be organized? Is there any specific desirable way of organizing it or - you mentioned a policy



manual - is that particularly functional - is that better than say just recording in the minutes or ...

R: Well, the advantage of having it organized into a manual - with the advantage of indexing and that sort of thing is that the policy manual is going to be put in each one of the schools and - in fact with everyone that has any interest in the administration of education, and they can very quickly, in any given situation refer to a policy manual - first of all to see if there's any policy in place, and secondly, if there is, to see if it addresses a particular situation.

I: Ok. Who makes school division policy?

R: Well, in the final analysis the board makes the policy - through the procedure of approving particular policy that is set before them. I would suggest of course that the writing of the policy to begin with, is to a large extent, the responsibility of the superintendent or the senior administrative officers in the school division. Probably they exercise a great deal of leadership in the particular policy - just using again our own situation - as I mentioned earlier on I think - we're presently reviewing our policy and that's partly because of the fact that we have a new superintendent in our employ and the policy has to be something that - to a large degree at least - that the administrators are comfortable with themselves - so I think

that - as I said a moment ago - it's certainly the board that sets the policy that the senior administrators have a considerable amount of influence as to what that policy is.

I: Is there anybody else who has influence into policymaking?

R: Well certainly from time to time the public would. Most boards consult with their employees beyond the administrators - certainly with the teachers as an association and we would listen to individual teachers as well - in that any policy that we set that has a direct relationship to the teachers - we're gonna consult with them. It doesn't necessarily mean that we're going to agree with what they suggest but - that consultation procedure is there and again, there's other groups that are reflected whether it be caretakers or bus drivers - there's no point in the board making the policy where - the transportation system for example - if it's unrealistic and the bus drivers are not comfortable with it at all - all that happens is that it won't be followed.

I: Ok, so you're suggesting that input from - pretty well all quarters - whoever's affected then - that's acceptable. Do you place any limits on that? How much input should these individuals have?

R: Well, I would suggest that this would vary first with every division and every situation that the input would just be at the level of discussion and again, the final decision of the policy should be a decision of the board.

I: So you place no caveats on the amount of input from the various segments? You're open to them as much as they want?

R: Well, within reason - if they're coming to every meeting lobbying for a particular policy change, that would perhaps be beyond what would be acceptable.

I: But that would be an exceptional case?

R: Oh yes.

I: Ok. What's the role of the individual trustee then in policymaking?

R: Well, to begin with, I suppose the individual trustee would and could and should make suggestions for policy - and having done that at the stages of suggesting particular policy changes the - he should be expected to pay pretty close attention to really what those policies are saying and whether or not that's acceptable to themselves as individuals and to the people that they represent. I think their biggest responsibility is to sort out the opinions of

the people to whom we were referring to earlier on - the other groups involved with the education process in the division, and to try from that to set a policy that's acceptable to the community and that's also workable.

I: I don't want to put words in your mouth, but are you intimating here that there is an evaluative role - that they evaluate all of this input and that they make a decision based on those evaluations?

R: In some circumstances they would take an evaluation role. I guess it just depends on how you define evaluation.

I: Well, I mean weighing - I think you've said that they look at all the stuff that people have said and make a policy from that. Is there an element of judgement in there?

R: Oh. Yes.

I: On what would that judgement be based?

R: Primarily it would be based on as much information as you can possibly gather about a particular subject that's under discussion.

I: Ok. I wonder if you can think offhand of an example of policy that was made by input from one or two or three groups or individuals?

R: Well, I come back to the one I referred to earlier on - I guess that's because it's fresh in my mind - the particular policy as to whether or not we'll allow alcoholic beverages into the schools. It was something that was instituted by the community - our policy had been that we would promote the community use of the schools to whatever degree possible - we always had that rider there that we would not permit alcoholic beverages into the schools. The communities suggested that perhaps that was unreasonable for things like wedding receptions and those kinds of things. What really started it in our own school division was the centennial celebrations - they wanted the large facilities of the school gymnasiums to put on centennial functions and they wanted alcoholic beverages to be - permission to serve alcoholic beverages - so there was community input into that particular decision and it was a - I guess the initiative for it came through the community - it was introduced to the board by trustees but it was because there were people whom they represented asked for it to be introduced.

I: So you went back to them to get their opinions?

R: Not as a board we didn't - but as individual trustees we did - we surveyed the opinions of the community as far as possible.

I: Was anybody else involved in that - teaching staff, administrators...

R: Not directly the teaching staff, but certainly the administrators were and the caretakers and principals in the schools.

I: Has your view of who makes policy - I guess it's fair to sum up what you're as - although the board has the final say, lots of people are involved in making policy - lots of people have an active role to play - all these groups that you've mentioned - now has that view of who makes policy - has that changed over time or is that something that you have always had?

R: I think that we're becoming more aware of the need to consult with other groups in the community as far as policy is concerned. The original policy that we set up in our division was pretty much done in isolation - simply the viewpoints of the people that sat around at the board table.

I: What's brought about this change in attitude - this realization that you need input - what's brought that about?

R: Well, I think that probably the - perhaps we need to go back a little bit in history - when I mentioned earlier on that I'd been on the board since the unitary division came in - there was a considerable shift - and

again, bear in mind that this is a rural area and all the elementary schools in the geographical area that we encompass - a dozen or so school boards that were in existence to administrate those schools were dissolved - so that one board became responsible for the operation of the entire division. So, I think that for a little while there was a feeling that the board was operating over an area basis and that what we thought in our good judgement was right was right for the whole area and which included a number of communities. We're beginning to realize over a period of time - when I say beginning, it's something that happened a long time ago - we really are a community of communities and we really need to be responsible to each community and again, moving from a situation where there was one or two teachers in a particular school, and perhaps one principal - where these people most often sat at the school board meetings in the past - that of course disappeared with the big is better approach - with the larger unit and there was a transition period, I guess, between having these people actually sit at board meetings and talk about school board business. All of a sudden they were part of a larger group and that took a little while to make that transition between having them at the meeting and consulting with them as a group, instead of the actual individuals that are in the local schools.

I: Ok. The view that you have about who makes policy - you know when you talked about input and the various groups with the board having the final say - does that in any way affect the way you approach policymaking and how you go to the board prepared to make policy?

R: Again, I'm not sure that I understand that. I think it's obvious that it does. If I had a particular suggestion for policy, I'd bring it up at the board meeting - if it was in the field of education - for instance the use of corporal punishment in school - I would suggest, and I'm sure the board would - that it be left to the superintendent to discuss with the local teachers' association and the administrators in each school.

I: Perhaps then, it makes you a little more open to soliciting input. It seems to me that you feel a necessity for that input, so are you more prone to do that?

R: I think that the - as we were talking about earlier - the - what's developed in my mind is the obvious need to seek the opinions of those people who are directly affected by any particular policy that you're considering.

I: Ok, the next question is how are policies made. By that I mean - what processes or procedures are gone through in making a policy - what's the first step all the way through to the last step in making a policy?



R: Well, the particular procedure that we're in right now in our own division - we're reviewing the entire policy manual - we set up a committee to begin to go through it page by page and, working with the superintendent - the committee are doing precisely that - making recommendations which are brought back to the board - depending on whether or not there's been a change or depending on the extent or effect of the policy, it's usually left for a couple of meetings and then - if no-one has suggested any further changes then someone gives notice of motion to make a change in the policy and procedures and...

I: What's the starting point of this whole thing? Let's say you develop policy on a given topic - how does it start? What's the initial thing that convinces you to make policy?

R: I suppose the recognition of the need for a policy would be the starting point.

I: And then from there - from that recognition, you go where?

R: You would study - once you've established the need for a policy - then you'd look at the particular subject that was under consideration and examine different ways - different policies that might address that particular subject which would be brought to the board for their consideration.

I: And once they'd considered it a recommendation is forthcoming - is that it?

R: Uh huh.

I: And in that consideration process - again, I get back to what I asked you earlier - is it an evaluative component - are they evaluating the pros and cons?

R: Certainly they would be evaluating the opinions of the - and depending again what the policy is, - if it's such that it's affecting a number of other people - the opinions of those other people should be considered as well.

I: Ok. Can you tell me - you've just outlined a process for how policy is started and goes through to completion - are there any things that might influence that process? Things that might in some way alter it, or even if it didn't alter it, would be a very significant influence in the determination of a policy?

R: There could be need for expediency - if a particular situation arised that required quick decisions - in that case I would suggest that the decision would be made by the board - perhaps that's partly in answer to your earlier question - perhaps that's where the initiation for a number of the policies come from - that the board had to make a decision on particular issues - that's in a quieter time when we aren't under the pressure of time discuss this

particular situation further and develop a policy to cover it.

I: So expediency then would influence it. Anything else?

R: Not that I can think of at the moment.

I: That's ok. How do you know when a policy needs to be made or needs to be revised - I think that you partially answered that earlier - you said when there were problems...

R: I don't know - I guess the obvious answer would be the time when the policy that's in place is not working - then obviously it needs to be revised if it's not working.

I: What about if you don't have a policy?

R: That would be a situation we referred to a moment ago if a board had to make a decision in a particular area in the lack of a policy being in place - and again, I think we should emphasize that policy's just - is not something that is set in stone - the board by motion can elect to take a slightly different route in a particular situation if they deem it necessary and if necessary, change policy to fit that direction.

I: I'm just curious - surely there are a number of times when boards make decisions about specific things, and yet those don't become policy. What's the difference between making a decision about something that will not become a policy and having to make a decision about something and deciding that that will be a policy. What causes that distinction?

R: I suppose the distinction would be - how often do you expect that situation to come up again in the future?

I: Ok. So if it's likely to repeat itself then what happens?

R: You may recognize a need to have a policy to cover.

I: Can you give me an example of that kind of a decision which you feel might come up again and therefore should be covered?

R: Well, looking again at transportation, if you did not have a policy in place for storm days for example, a decision has to be made very quickly some day when a storm comes up unless the principals of the schools and the van drivers don't have some kind of a policy to follow - they would each be going in different directions. So, you set up a policy to cover that situation and perhaps find a situation arise where it doesn't work and then it's time, I guess, again, to have another look at it.

I: Ok. How have you arrived at these conclusions about policymaking and the policymaking process? How have you arrived at these views that you hold?

R: I suppose mostly through past experience - in my situation - I've been around the table long enough to know.

I: Are these views substantially different than what you held to be true before you started?

R: I don't think so - beyond - well it's a hard question to answer because I don't know that I had any views on policy before I went on the school board.

I: So in that sense, they may have changed drastically in that you've developed some?

R: Well that's right - yes.

I: Ok. Well, maybe you could outline for me what you consider to be the attributes - elements - of a good policy. What are those things that characterize good policy?

R: The first thing that comes to mind would be flexibility. I've never been particularly in favor of a policy that - I think I used the word guideline earlier on - I would suggest that in my view flexibility is an important part rather than setting out that this is the way it shall

be done - this is the way it should be done in so far as possible because I think you need to rely on the experience and intelligence of the people that may be administrating this policy - give them a little bit of room to use their own good judgement. Secondly, I think it should be relatively simple - relatively easily understood by anyone who's reading it - any member of the public who is reading the policy manual of the school division - I think they should be able to fully understand what is meant by that policy - it's not full of educational jargon that might not normally be understood by someone who's outside the educational field.

I: Ok. Are there any particular things that you might do to make sure that the policy is easily understood?

R: Well, the first one would be that I understand it myself - what it means and...

I: You're talking about the way it's written?

R: That's right - the actual language that is used. That's an area that needs great care because in the development of a policy, you're privy to the discussions that have gone on behind the writing of that policy and sometimes you read things or you assume things that someone who has not been privy to those discussions don't realize. So, when I say it should be simply and easily understood -

that's sometimes difficult to do when you haven't had the advantage of listening to all the discussions that took place.

I: So a good policy should be flexible, easy to understand - anything else?

R: Nothing that comes to mind at the moment.

I: Bearing in mind that the next answer may obviously be the opposite of these things, what is it that constitutes a bad policy? Obviously I would have to assume that if it wasn't flexible and it was hard to understand it would be bad. Anything else that might make for a bad policy?

R: Being unfair - maybe that's the opposite to being easily understood - I guess it is - ambiguous - and certainly policy that doesn't reflect particular goals - not only of the school board's but of the community's and of the school's in the community - and that could change over a period of time as we've talked about before.

I: When you say it doesn't reflect the goals of the community or the school board - are you talking about acceptability - are you talking about something that's acceptable to the community or to the school board - in other words, policies have to be acceptable - or am I putting words into your mouth now?

R: I wouldn't have thought of the word acceptable because to me that implies saying that we wished we had something else but we're prepared to live with what we've got - so I don't think acceptable is the word that I would use. I would hope that it would go beyond that - it would be more than that - that it would be a policy that was - reflected what people wanted.

I: Ok. How have you arrived at these conclusions about what makes good policy or bad policy?

R: Well, if you're looking for specific instances I don't think that I would have any that I can think of off hand - where I've seen something happen as a result of some of the things we've been talking about. I guess it's more of a broad view that I have about policy.

I: I wonder if you can give me any examples from your experience of a good policy in place of a bad policy?

R: None.

I: Ok, that's fine. Well, you have some very definite views about what constitutes good policy and what constitutes bad policy - those viewpoints that you hold - again this may be a self obvious question - but those viewpoints - do they affect your approach to policymaking?

R: It has to.



I: Again is this in the striving sense that we talked about before - that's where you strive to establish good policy - clear policy?

R: I'm not sure that I do that consciously - but I hold those views and I suppose it's like being a part of a political party or a political belief - you tend to think of things in terms of what your own beliefs are.

I: Ok. How do you evaluate policy?

R: After it's in place?

I: Two types - when you're making it - how do you evaluate that you're making a good policy and how do you evaluate it once it's in place?

R: In my own case I think I probably lean to my own particular viewpoints - I would like to say common sense but maybe other people around the board wouldn't agree with that - common sense in my view anyway - again, having the opportunity of having the opinions of - I think it's very important that you consult the people that have the responsibility of administering these policies as to whether or not they're comfortable with it - not necessarily to accept the same philosophy behind the policy but at least they're not totally opposed to it. I think there are times when the school board has to set policy that may not be that popular with groups within the education community - but before you

do that - as we talked about earlier - you need to consult with and - if in the final analysis you feel you have to adopt a policy that is contrary to their views then you have to be able to see a way that they're going to be able to accept that.

I: Have you had any experiences as a trustee that have particularly shaped your views about policy?

R: I can't think of any particular instance or occurrence.

I: Any kind of experience - maybe it might have been training in a certain field - or it may have been something that happened at the board ...

R: As I say, I can't think of any particular instance that might have triggered that kind of thinking or that recognition of the necessity - I think I mentioned earlier that Roy White was the person who first mentioned it to my memory at least - gave our board that direction and ...

I: Well, this research is concerned with how trustees think about policy and policymaking. This may be self evident, but until we look at it somewhat scientifically and research it to a little extent anyhow, we can't really say with any degree of certainty but - I feel, that the way trustees think about policy and policymaking could

have an influence and a bearing on the kinds of policy statements that emanate from boards. I'm just wondering how you feel about that?

R: Well, since they are the people that are making policy, I would agree that that's probably a good assessment. The kind of policy that comes from boards will depend to a large extent on the make-up of that particular board - in other words, you will definitely have different policies from school division to school division. The primary reason for that is the attitude of the people around the board table.

I: So you think it's a fair assumption?

R: I think so, but I think you can also draw the conclusion that in the long run at least, it's a reflection of the community because trustees are elected locally from those communities - as you do in any democratic process, you get variations from the norm, if you like, but in the long run or on the average or however you like to put it, the people around the school board table will be reflecting the views of the community. So, I'm just throwing that in there to say that it goes beyond the particular bias or attitude of an individual trustee.

I: Do you think this kind of research which is trying to get a handle on how trustees view policy and policymaking - do you think that kind of research is worthwhile?

R: I suppose my response to that would be similar to what we've been talking about in the development of policy - that my initial reaction or lack of action fifteen years ago was - indicated that there was no recognition of the need for policy in the school division. I guess my first reaction to what we're doing here is a question of again, particular value to it. That's not to say that there might not be - depending on the conclusions. Sometimes I think it serves a good purpose - group of people outside in our own particular circle examine the ways that we're going and what we do with information after or what the community does with it is perhaps neither here nor there, but it doesn't do any harm. You look in a mirror and you see yourself but if someone else is looking through a window at you, they see you differently. I think those opinions are good opinions to have.

I: Ok. Do you feel that the kinds of questions that I've asked you are suitable for getting at your particular views about policy and policymaking?

R: Sure. I couldn't think of anything else that you might have asked that would have triggered any different thoughts.

I: Ok. Is there anything that you'd like to add that you feel is important to my understanding of your views about policy and policymaking and which I haven't covered?

R: No, I don't think so Ken. I think it's important that you understand the - my background - and I think that you have that information and - because people certainly think differently depending on where they're coming from. I guess you're aware that XXXXXXXXXXXX School Division is a relatively small school division and again, when we talked about community input - small rural divisions really generally tend to have that through the trustees themselves. You rarely see that in larger urban divisions and maybe you need to have fifty people from the community coming to a board meeting - I don't know.

I: Ok, I'd like to thank you for your time and your input.

R: You're very welcome. I hope you'll get some use out of it.

TRANSCRIPT # 11

I: I wonder if in your own words you could tell me what is policy as it relates to school boards and school divisions?

R: I would think that policy would be the guidelines for the operation of the division as set forth by the board.

I: When you say guidelines do you imply that these are not rigid?

R: No, they're rigid guidelines - there may be certain flexibility that the administrators have within those - depending upon how rigidly we strike a policy when we strike it - but, they are rigid guidelines that can't be changed without notice of motion and majority vote and so forth.

I: Ok, so they may have some flexibility within them, but that's strictly limited?

R: Right.

I: Can you give me some examples or an example of policy?

R: Well, last year we - until that time - did not have a definite policy regarding drug and alcohol abuse within the schools. At that time we formulated a policy with regard to that. We have a policy manual, but in comparison to a lot of other divisions it's a very inadequate document, and we have discussed upgrading it. It's kind of a mind boggling project to get into, and we haven't done as much as we should with it, but something has to be done with it.

I: I wonder - on your drug and alcohol policy - can you off hand remember some components of it - some of the specifics in terms of guidelines that you were talking about earlier?

R: Yeah, I'm just taking it from memory so I may forget some, but we set up a series of procedures that an administrator was to follow if he detected the use or possession of either drugs or alcohol in the school and - his first step was that he was to immediately inform law enforcement agencies. He was to detain the accused person within his office until investigation could be made. He was to notify the division office superintendent of the situation. He was to inform the parents as soon as was possible. If possible, the parents were to come to the

school and discuss the situation with him, and then that child was to be suspended from school until an investigation could be made. If the investigation indicated that there had been an abuse, then that suspension was to hold until the next regular board meeting - at which time the board would decide upon any further action to take place.

I: Ok. That's pretty clearly defined then and in a situation like that, it's almost more than a guideline isn't it?

R: Yeah - right. In that case - right - there were definite steps laid out as to what should take place.

I: Ok. Would the administrator in question have any latitude in doing any of those steps or in skipping over any of those steps?

R: No, not really - the only thing being that he - in conjunction with the superintendent would conduct the investigation - and if it were to their satisfaction proved to be foundless then it wouldn't come to the board level - but beyond that, no - not in regard to that particular one.

I: Ok. Are there any differences between policies and goals, objectives, or desires of the board? Is there any relationship there?



R: To my mind yes. Policy would be the structure that we establish for the day to day functions of the school - whereas your objectives and goals would be your long term hopes and aspirations. The policy hopefully would be designed in such a way as to attain the goals and objectives, but - to my way of thinking - policy is a more mundane day to day type of thing - whereas goals and objectives are your overall scope of where you're heading within the division.

I: Is it fair then to say that you equate policy with sort of the tools of approaching your goals and objectives?

R: Right. Right.

I: I don't want to put any words into your mouth...

R: No - that would be my idea of it.

I: Ok. Why do you hold this particular view of what policy is?

R: My exposure to policy has been with relationship to this one that I've just described to you - we also developed a policy - put into board policy a layoff procedure for laying off of teachers. We've had occasions where controversies have arisen - things have come to the board -

and we have solved some of them by going to board policy and seeing what our policy is. We've all too often found that we don't have board policy and that we have to establish something. From that experience, policy seems to me to be relating to the day to day functions - more or less the laws and rules of the division that we set down. Ok. So that's sort of how I see it.

I: In other words, your viewpoint has changed then, I gather, from the time when you first became a trustee?

R: I think so. I was rather naive, I think when I first became a trustee. I was quite unfamiliar with the workings of the board. I didn't realize that there was a policy for a lot of these things that we sort of operate upon a precedent that had been set and - it's changed somewhat - yes.

I: Ok. Well, does your view of the nature of policy affect the way you personally approach policymaking?

R: Yeah, I'd say yes.

I: Ok, can you think of how it might affect it?

R: Well, when we come now to formulating new policy, I relate back to what I think of policy as being, and within those guidelines I would do my formulation of

what I would think would be good policy. I don't know if that answers your question.

I: Yeah - in other words you aim to make policy

...

R: Within what I see policy as being - yes.

I: But you've described it as being somewhat of a tool for day to day operations for reaching objectives and so you - I gather then - would specifically try to formulate policy in that direction.

R: That's right.

I: Ok. Do you think policy is necessary?

R: Yes, I think very definitely.

I: Why?

R: We have administrators - and competent administrators I think - to operate the schools, but it is still the responsibility of the board to see that education is conducted within the division in the manner that we think is - of what the ratepayers want as their education policy within their division. I think that to do that, there has to be some structure that the administrators have to work within to maintain the type of operation that local people want.

I: Ok. So the necessity of policy then is to ensure that the local people have their views and wishes expressed and hammered out in some fashion...

R: Right. What might be appropriate policy within my division might be very inappropriate - I would think - within another division - Hannover or whatever - where there are ethnical differences and different values and so forth.

I: Alright. Can you give me perhaps an example of an occasion when you found that it was absolutely necessary to have policy then - relating it to what you've just given me as why it's necessary?

R: Ok - Take for example policy regarding corporal punishment and what's deemed to be acceptable within the division. I think that what various communities deem as being appropriate in that case is going to vary and I think it's important then that there be some policy that assures that acceptable procedure is going to be followed within your schools - what's going to be acceptable to that community - that's one example.

I: Ok.

R: Another one that I possibly could give - although our hands are a little bit tied in this policy regarding layoff of teachers - here though, it was a policy

formulated in conjunction with the teachers, so it wasn't entirely a board decision - but there was some input there as to what the community would think would be acceptable - what they expect from the teachers and what they would like to see in the intention of teachers.

I: Ok. Has your opinion changed in this regard? Have you changed your opinion about the necessity of policy over time or has this been something that you've always had?

R: No - I'd say that I now feel that policy is more necessary than when I began. When I first came in, I wasn't pro or con as to the necessity of policy. As I have more experience with it, I believe more and more in the fact that there should be policy. It has its limiting factors too. It's a two way sword. It gives you guidelines - in fact sometimes, as you say, more than guidelines - it commits you to a certain path and at some time - an instant may occur where you find that that particular path that you have chosen is not necessarily the one that at that instant you might feel is the path that you'd like to take - and at that point, you are committed to it by your policy. So, you have to be careful, I think, in its formulation and it's important that there's a mechanism for changing it because it gives you guidelines but also it commits you sometimes to things that may not seem appropriate in the situation.

I: Is there a way out of those situations?

R: We have within our procedural by-law that - for a change of policy - that a notice of motion be given and that at the following meeting that can be brought forward and policy can be changed in that way - so, there is a mechanism.

I: What if the situation requires a decision more immediate than that?

R: Ok - we also have in there that emergency meetings can be called with a certain stipulation as to quorum - and I forget exactly what the percentages are - but in that case an emergency could be called if a proper quorum could be formed, and notice of motion given and then at the next meeting immediately following that - in an emergency - it could be taken care of in that way.

I: So, maybe that relates a bit to the flexibility that you talked about at the beginning?

R: Right.

I: So, it's really not a flexibility within the policy itself, but more in the formulation of the policy.

R: Formulation and the method of change.

I: Ok. Should policies be written down?

R: Very definitely. I think so - yes. We've run into instances of it - as I say, we don't have nearly as adequate a policy as we should have - what has happened is that instances have come up at a meeting and somebody will say "Well, I think that's been covered. Two years ago at a meeting, I recall very distinctly that we passed a motion to this effect and we've established that precedent so I think we should stick with that precedent." But, nothing was ever recorded in policy. The argument ensues as to exactly what the situation was at that time. It's not clear to anyone and it becomes a real hodge-podge. I think that it's very important that a definite policy be established and that it should be recorded.

I: Ok - just for the record's sake then?

R: For the record's and also it's very helpful, I think, for new trustees coming on to a board if there's a full policy written up - they can read through it, and they become much more knowledgeable much more quickly than if they have to sit through a couple of years of hearsay and experience to gain these things.

I: I wonder - is it possible that policies exist without being written down?

R: Well, I think they do.

I: Can you give me an example?

R: Ok - I think one example would be in the case of transportation - we're just in the process now of - because of new legislation that's come out regarding operation of buses and so forth - of formulating a policy - but as of right now, we don't have one. With regard to carrying of hockey equipment or various objects on a bus - there has been an unwritten policy to the fact that we wouldn't transport that type of thing. However, because it wasn't written, it may be that it wasn't as well adhered to as well as it would have been if it had been written. Occasionally the good Joe - the good-hearted bus driver is going to let somebody bring it on which is much to the chagrin of the other bus drivers who are then painted as the bad guys because they don't allow this to happen. But, I think that there likely are other cases too in that our policy isn't that elaborate - we do operate sort of on precedent. We had an incident when I first came on the board where there was a question of going in to pick up a child on a road that had always been considered municipal - however - it was found out by a neighbor that it was not a municipal road - that it actually was a private road - we did not have in policy anything regarding that, but through precedent - over the years - we had an unwritten policy that we did not go down private roadways to pick up children. And it became a very bitter debate in that these kids had to walk something like 3/4 of a mile - whether we would go in or wouldn't go in -



but because of unwritten policy - because of precedent over the years, we ruled that we would not - we had turned down people on that in the past and we chose to turn their request down as well.

I: Is there any advantage or disadvantage to having non-written policy?

R: It's just my view - I would say no - there's no advantage to having unwritten - I think the definite advantage in having it written - perhaps it could be argued that it can lead to more flexibility if it's unwritten - however, I think it leads to a lot more disputes. If you're going to start changing course in mid-stream it's my view that you have to deal with all people equally and fairly - and if your written policy doesn't allow that, there are methods of changing it - and I'd prefer to go that route instead of having unwritten which I think leads to disputes and controversy.

I: But you say that it does exist and therefore there must be in some people's minds some reasons why it is allowed to exist.

R: Yeah - I think that a lot of the reason here is that we simply have not got down to - it's getting a policy to cover everything - and maybe it's impossible to have a policy to cover everything because even if today we

miraculously developed a policy that covered every aspect - education being changing and flexible - tomorrow likely an instant would arise that wasn't covered by our policy and you'd be out of date already - so, for that reason, I think, there's a lot that doesn't get written but - as much as possible, I think, it should be.

I: Ok. Well, if policy should be written down, is there any specific way that it should be organized? Should it be catalogued in any particular fashion?

R: I'm not about to suggest the method of cataloguing, but yeah - I think it should be categorized. And, I suppose arguments could be made for various methods of categorization - but I think it should be categorized and indexed so as to make the material that you require easily accessible by going through the index or by going to the category that you're interested in.

I: I assume that you view that then, as another means of enhancing the working day in the day to day work - in that it's an easy reference, easy to find, that sort of thing.

R: Right. Right.

I: Ok. Who makes school division policy?

R: The school board as such makes it - often on the recommendation of our administrators - but the ultimate decision as to policy is made by the board.

I: But, you say that there's other input beside the board's?

R: There's definitely other input - yes.

I: Who has input?

R: It's going to vary depending what the policy is going to be but - for example, with the transportation policy that we're now trying to develop there's a team of the transportation committee, the transportation supervisor, the administrators of our high schools and a couple of bus drivers. As much as possible within an area, we like to call upon those people who are involved to have their input - although the ultimate final decision will rest with the board.

I: When you say involved do you mean affected?

R: Yes.

I: Would that then also leave the door open to input by students who would take part in this transportation and parents of those students?

R: At this point, we haven't - no - not there - and to be honest, I don't think that in too many cases we've had direct student input, although often through the administrators we get feedback as to what the students want. With the drug and alcohol policy - in the particular school where the abuse had taken place that gave rise to this - the students had a considerable input to the principal as to what their expectations of their fellow students was - and it was, I felt, a surprisingly mature input in that I think they were being a lot harder on the individuals than what we might have been. Now if you're looking at things that are going to affect the day to day teaching in the school, then usually we have teacher committees jointly with the board committee formulating policy of that type so...

I: I notice that you've never mentioned the ratepayers here - do you perhaps view the board as being representative of the ratepayers - is that why - or am I misreading things here?

R: No - we don't run at every instance to the ratepayer - on important issues I think we do consider ratepayer influence. Often we have delegations - those delegations I think influence our thinking to a large degree as to some policy - with regards to the meeting that we're having tomorrow night regarding school closures - you do know that there are provincial guidelines now that require twenty

months and require all of these meetings and so forth to be held with the public - we number one don't really regard this as a closure as such - it's a transfer to a school in the same community so I don't know whether we fall under those guidelines, and secondly - we view them as being guidelines and not law and we feel that it's cutting a little bit into our local autonomy, so we're not following any procedure because of those but because of our concern about what the public does think. We are having a meeting and I think quite honestly, we have not formulated either a yes or a no as to what is going to be - and I think that public input - if it is decisive - one way or the other - is going to have a large say in whether the school's closed or whether it isn't. So, I think, we do have ratepayer input but in a lot of things - not directly. I as a trustee will discuss things with ratepayers and the feelings I get from the community - that's what I'll bring to the board table and that's often the level of the ratepayer.

I: You've talked about input from a number of individuals - I just wonder how much input these individuals should have. Is there any set limit or quota?

R: No - I guess for expediency - at some point you have to cut off input with regard to policy. But, I'm of the view that the more input you can have, the better. Now often it's going to be conflicting input because of the

interests of the people - so again the decision has to be yours but - the more input that you have, the better informed decision I think you can make. I would be very hesitant about restricting input. If somebody has the interest and concern that they're willing to put forward their views - I'm quite willing to listen.

I: Ok. What's the role of the individual trustee then in policymaking?

R: Ok. I guess to a large extent - for a lot of these things - we rely upon our superintendent who in this case is a superintendent and a secretary-treasurer jointly - he holds both offices - we rely to a large extent on his bringing forward problems and things for our concern and for decisions to be made - I think as a conscientious trustee it should go beyond that and as a trustee we should be ourselves reviewing our policy - suggesting changes where they need be made, and in our case, additions where no policy exists. I think it's very important and when we started discussing last year the revising of our policy - the updating of it - if time weren't a factor I sense that there were a number of trustees on the board who would like to serve on a committee that they themselves with outside assistance that they might require - would like to formulate that - rather than hiring some outside consultant to come in and write a policy to be rubber stamped type of thing.

Time's the factor though. To do a proper job of developing our policy from where it is now to where it should be - I can see having to devote a good part of a half year - virtually full time - to really doing it right - and I would like to see it done right.

I: Can you give me an example of a policy that's been made by input from various groups?

R: The alcohol abuse one - again that's going back and harping on that one - but that one had input from a number of sources - the students indirectly through the principal, the principal, the superintendent - indirectly the ratepayers because there had been a delegation with regard to that - and I think their concerns were expressed in the policy that we came up with - teachers only through the administrator - they were not involved. We recently revised policy - it wasn't really developing a new policy but - revised policy for teacher evaluations and the personnel committee of the board took part in that, the superintendent took part in it, representatives of the administrators took part in it and teacher representatives as well took part in that.

I: You said that the board makes policy but then went on to add that in the actual formulation of it, there's a lot more than just the board involved - has your view of who makes policy in that sort of total vision - has that changed since you first became a trustee?

R: I think - yeah - there's more input from other sources than what I realized. I was more of the opinion that boards simply by decree made this policy, and I really didn't know how much outside input there had been - so, I'd say yes - it's more comprehensive than what I had first envisioned.

I: And how did these changes come about?

R: The changes in my views?

I: Yes.

R: I guess from viewing policies that have come to the board table - I was as part of the negotiating team - worked together with the teachers in the formulation of layoff policy - and from those experiences I realize how much input comes in from other sources.

I: So it's by experience basically?

R: Right.

I: Did you take any training in policymaking or anything specific like that?

R: To be honest, no. There have been various seminars and so forth held by MAST, but with regard to policy - during my time that I have been on - I don't think there's been anything, and if there has, it's been something that I have missed and I haven't attended.



I: Ok. Does the viewpoint that you hold about who is involved in making policy - does that affect how you approach policymaking?

R: Yeah - I think very definitely. I guess you're forced to approach it more open mindedly because of the other people involved - it's less dicatatorial - and although it sometimes is that, it may be counter to what you feel is best - in the long run I suppose it's good. One level of input regarding policymaking or one group that has input and that I didn't mention - and it's likely the most influential group - I would say - would be the government - through grants and various regulations. It seems to me that it's becoming more and more of an influence on our policy-making than ever before.

I: Ok, well you've talked about who is involved in making policy and what it is and that it's necessary - I wonder if you can tell me now specifically how policies come about. How do they come to be? What are the processes or procedures involved in the formulation of a policy - what are the steps from beginning to end?

R: As I envision it - first the need for the policy becomes apparent. Whether it is a non-existent problem that is envisioned as possibly being a problem in the future that we feel we should address now before it does become a problem, or whether we are lax and the problem

comes upon us before we have a policy to rectify it - but one way or another the problem or the possible problem becomes apparent. At that point, the procedure that we take is that we decide what group or groups are going to be involved in consultation regarding the formulation of the policy. It may be something that is very board orientated - we set up a procedural policy - well it's actually a procedural by-law that went within our board policy - in a case like that it was simply an ad hoc committee appointed by the board without any other outside input except information we could acquire from other divisions as to what their policies were. And the policy then went through that committee stage with the various research of materials that they could find. When they formulated the policy or the by-law, then they brought it to the board as a whole. The board as a whole, upon having it and having a week or so to review it, then took the vote on it and it became policy. That would be one of the simpler ones. In other cases it's a matter that concerns maybe much more than just the board itself - various groups are affected by it. We try to then set up some type of a committee or have some type of a hearing that would include as many of the affected groups as we feel we can incorporate. They then as a committee review and study the matter - develop a policy and bring it forth to the board. Occasionally the board will not find it acceptable or will want some slight ammendments or will reject it - but

once that process has been gone through - it's either been accepted or ammended - eventually it is accepted and it becomes board policy. From my experience, some of the seemingly simplest things - we've had the most difficulty formulating a policy on - community use of schools is something that we have been working on for three years and finally just developed a policy on. Again, perhaps because of differences from one community to another, what seemed to be an acceptable policy for one end of the division was not acceptable because of different customs and practices at the other end of the division. Something as simple as how the community's going to use your school tied us up off and on for almost three years.

I: Ok. What kinds of things influence how policy is made?

R: Public attitude I would say would be the biggest influence. Although we don't that often go to rate-payers in the form of a referendum or anything like that - I think in the back of your mind you're guiding your decisions as to how you view your ratepayers will accept this or whether they feel it will be appropriate policy. That's a big one - and again, the same groups that I described before - if you have good administrators, I think you're going to have to rely very heavily on upon their opinions. If you don't have good administrators, then you should be getting

good ones and I - for that reason - rely very heavily upon the administration advice which we're given - we have good people, and that's what they're hired for - that's where their expertise is and it fits in I think - we have to go by that a lot.

I: How do you know when a policy needs to be made or revised? Are there some signposts along the way?

R: Ok - often we become aware that our policy is inadequate either through change in the act or change in government regulations - often through cases that are communicated to us through MAST or other divisions that have run into difficulties in certain areas and have had court cases and so forth concerning these matters - we look at our policy and say "Hey, are we covered here? Do we have adequate policy with regard to this?" Quite often we decide that our policy is not adequate and that it should be revised and updated.

I: Ok. So, essentially what you're saying is that if there is a problem that exists and is not addressed by something - or whatever you have to address it is insufficient...

R: Unfortunately, I'd like to say that we are farsighted enough and that we could foresee these things before problems do exist, and that we would keep one step

ahead of the game - but to be honest, I don't think that we do - no.

I: It's an interesting perspective and I just wondered if - is it a fair assessment to say that - whereas you describe policy as being a tool earlier on - for every day - day to day operations - it's really specifically a tool to avoid hangups in day to day operations - to avoid problem areas.

R: Well, no - I would counter that a bit. I say that they tend to change when the problems become apparent. Things that are working adequately then do not get changed so they avoid problems when the problems do occur, but there's a lot of policy - 90 % of it - that does not change and is ongoing - and that overall policy still, I would maintain, is towards trying to have the day to day operations that would make it possible to meet your long range goals and objectives of the division.

I: So it's not necessarily a problem orientation?

R: No - but that the changes tend to occur when problems occur. Those problems could be that you're not meeting your academic expectations or objectives and therefore policy is going to have to be changed with regard to that.

I: So, in other words - going back to your earlier statements - I gather goals and objectives give rise to policy as well as problems.

R: Right.

I: Ok. How have you arrived at these conclusions about the policymaking process? Is that also an experienced phenomenon?

R: I would say that policy with regard to the academic operations of the school - I think I was reasonably familiar with from my teaching experience and as a teacher, I was affected by those policies. So that part, I think I was quite well versed in and I don't think my views have changed that much. In the more day to day operations of the mechanics of the school - transportation and maintenance - policy with regard to those things - I think I was very naive about, and through experience I've developed my ideas regarding that.

I: Ok. And the viewpoint that you hold about policy and how it is made does that affect how you approach policymaking?

R: Yeah - it does. Before I came on the board, I think I was typical of a lot of ratepayers in that everything seemed very simple and that problems existed and boy, if you were going to be on the board, you would straighten

it out in a couple of months - things would be running a lot better. When you get on the inside and start viewing some of the complexities and the many different groups and areas that are involved, it is a much more complex operation than I realized, and that has influenced how I would make policy. My view from the start was that I would go in there and I would very dictatorially make policy - and that would be it - and they would toe the mark - whoever they may be - and things would be solved. In that aspect it's changed.

I: Now you're what - more cautious - do you tread a little more softly?

R: Right - and I realize that legally and otherwise there are things that I just can't do that I thought I could just step in and do. So, I would try to use a lot more diplomacy in trying to get my objectives now than what I would previously. I find you have to convince people rather than tell people.

I: Ok. I wonder if you could tell me - what are the attributes or the elements of a good policy? What characterizes good policy?

R: Ok - first of all I think that your board policy for amending board policy has to be flexible in that there must be a mechanism for changing the policy if the need for change is seen - and that mechanism must not be too

complicated. However, the policy itself, I think, has to be very specific, very clear, and something that can be followed as easily as possible.

I: Ok. You distinguish between specific and clear - can you elaborate on those a bit?

R: By clear I mean put forward in language in terms that will be easily understood by anybody who has to follow that policy - specific being different in that it's got to be accurate, but it could be accurate in such language that it would be difficult to be interpreted by various components of the system that would have to be using it.

I: When you're talking about specific - are you talking about a policy that actually in fact addresses a problem?

R: Right. As much as possible - education being as complex as it is, you're never going to get policy that addresses every problem but - to try to cover the waterfront as much as you can.

I: Ok. Perhaps the converse of that - what do you consider to constitute a bad policy?

R: Ok - a weak policy to my way of thinking would be something you mentioned before - unwritten policy - I've



already made my views known on that - I personally just can't go for it...

I: Well it's not specific and it's not clear!

R: Right. And if it was you and I and we had an excellent working relationship and we were running the school division - you and I perhaps could have unwritten policy. When you have eleven members of a board sitting with - representing widely different groups of people - it just doesn't work - it leads to mass chaos.

I: Ok. Anything else that characterizes a bad policy?

R: The converse of what I've said about good policy - a policy that ties you in too rigidly and doesn't give you the flexibility for changing when the need for change occurs or makes it too long of a process - I think that's bad policy.

I: Too long of a process - you're talking still about change?

R: Right - you know, if it's going to take you a year to change your policy with regards to something, then that's far too late to address most problems that - there have to be quicker solutions to things.

I: When you say there has to be quicker solutions to things - is this time element one of the influences on policymaking - you mentioned political awareness as one of the things that had a great effect on policymaking - is time a factor influencing how policy is made?

R: In the case of where we haven't done our homework and a problem jumps upon us that we don't have covered, it may be. Where possible we like to in formulating the policy - and I was referring to the time factor as in changing policy - but if you're talking about time in terms of formulating policy - there, I don't like to put limits on time unless the situation necessitates it - but given a none crisis situation, then I like to take as much time as necessary to get good policy, rather than rushing into something that may not be what you want when you're finished with it.

I: Alright, how have you arrived at these conclusions about what constitutes good and bad policy?

R: I would say once again, by experience. We have - it's perhaps not policy as such - but it seems that on this board since I've come on, you rule largely by precedent, and if you made a decision regarding a situation before based upon a certain precedent - that's what you're going to do in this given situation - then you tend to make that same decision time after time, so as to be consistent throughout the division. That then has led though, to a lot

of controversy because it's unwritten and it's not necessarily crystal clear in the minds of the people who are there at the time because of changeover in members of the board - people who were not there the last time this particular unwritten policy was invoked - it leads to all kinds of confusion. So, every time the situation arises you go through this huge debate again as to how you're going to resolve this situation. And there's a needless waste of time and there might be some inconsistencies arising because you're not following it exactly the way you had previously - and for that reason it's hard I think - it should be recorded.

I: Again, it's pretty well experience that has...

R: Right. Upon my coming on the board we had a couple of instances where I found myself in that situation - debates were going on about unwritten policy - I couldn't make an informed decision one way or another because I didn't have any experience about it - I sort of decided to deal with the case from what I could see at that time, and it was very difficult - and they were bitter debates. Naturally, a person who is representing ratepayers within his ward who are affected is going to try to stick up for the rights of those people and it could get to be a rather bitter debate unless there was some guideline to go by. If the guidelines are there, then no question - unless - if he

can get majority opinion of the board that that's bad policy, then there's a process for changing it - the debate's over.

I: Ok. Can you give me an example of a good policy and a bad policy?

R: Items that would be good and items that would be bad?

I: Yes.

R: Ok - I guess for - if you want to take an area of teacher layoffs - and I've really done an about face on this - I originally came in in the view that every case should be judged upon its merits at the time and it should be a very open policy and that it should ultimately be the board's decision as to who they think should go and who should be retained. In the view of legislation and the rights of teachers to appeal, I now view that as being bad policy - it's too flexible, it leaves us wide open to all kinds of reprisals through the courts and so on - so a policy like that which is almost a non-policy - saying that teacher layoffs will be solely at the discretion of the board - I would view as being bad policy. What I would view as good policy would be something that has been negotiated between those affected - the teachers and the board - and if they can arrive at something that is mutually acceptable,

not perhaps the preference of both parties, but something that is mutually acceptable, then I - from administration-wise that - to my way of thinking - is good policy. It's something that - a guideline to your administrators - a path to follow - that path, because it's been agreed to by both parties should be followed smoothly and should be carried out with a minimum of problems.

I: The way - we've been talking about good and bad policy - how do you evaluate policy - whether it's good or bad?

R: I guess - and it's a vague thing - but if the policy lends itself to your ultimate goals and objectives - if it leads to those in a smooth manner, then that is good policy. If it does not easily lend itself to those goals and objectives - and I stress the word easily - then I would think that it's bad policy.

I: And do you have any kind of yardstick for that, or is it an intuitive call - a judgement call?

R: It's got to be partly - I guess - judgement call because goals and objectives are often years in the attaining so that policy that might be implemented today - its ultimate effect may not be found until perhaps a kindergarten class of today is perhaps a graduating class of tomorrow - so in certain aspects, it's got to be an intui-

tive thing. I don't think that you have to wait for the ultimate objective to have been reached, but from the change in the operations of whatever it may be, I think you can then start to gauge whether it seems to be that you're moving towards that objective. So, depending upon the situation, it may be almost entirely intuitive, or it may be something that can be judged almost immediately. If you go to your other areas, rather than strictly educational areas - the academic areas I should say - maybe to a transportation area - a change in policy regarding the operation of your school buses - within a week it may become apparent whether it's good policy or bad policy - simply by the more efficient operation of your system. When you get into the academics, I think you tend to be more intuitive and long range.

I: Ok - does your view of what constitutes good and bad policy affect your approach to policymaking?

R: Yes - they affect mine.

I: In what way?

R: They affect mine in as I have expressed to you - I think that policy should be thought out through - with input from various people that are concerned - I think that it should be recorded - it should be clear, concise and so forth and whenever possible, I'm an advocate of committee

work - and when things come up that could possibly go into policy, I am an advocate of rather than having this every half-yearly thrashing out of an issue - put it to committee - have a study made - have the recommendations come in and let's put something into policy so that we can get away from this.

I: So you - recognizing the necessity of policy and what constitutes good policy etc., you then go for it?

R: Right.

I: Have you ever had, as a trustee, any particular experiences that stick out in your mind and which really served to alter or change or shape your views about policy?

R: Yeah - if I can go back to - and I've already described it to you - the experience that I felt being a new member and having almost the entire first two or three meetings that I attended be involved in the controversy over this transportation problem that we had - and accusations flying back and forth as to what had been discussed at meetings two or three years ago - and what had gone into minutes and what hadn't gone into minutes and accusations to the secretary-treasurer that he hadn't recorded the minutes accurately - that experience - it was very very clear upon my mind.

I: And that sort of set in your mind what you wanted to do with policy?

R: Right. I said "Hey, this is not the way we go."

I: Ok. Well, this research that I'm doing is concerned with how trustees think about policy and policy-making. I have a belief that the way trustees think about policy and policymaking might be significant in influencing the kinds of policy statements that come out of boards. How do you feel about that?

R: It certainly should be. Members of the board are the people who ultimately develop that policy and what their views are certainly should have a very strong influence upon the policies that they're putting out. As I said, we rely on our superintendent and various other people to make recommendations to us, but still the ultimate responsibility for having that recorded and the manner in which it is recorded rests with us - and you can have a superintendent who has the greatest ideas and so forth in the world and puts those forward - but we do nothing but develop unwritten policies about it - you still have a hodge podge I think. So, I would say yeah, it's the ultimate influence upon the policies that should be coming out from boards of Manitoba.



I: Ok. Do you think that this kind of research is worthwhile?

R: I think - very definitely - I'd be interested in seeing what the ultimate findings were. We haven't really, since I've been on the board, had any seminars and so forth on policymaking. The only thing that I know of policy of other boards are some excerpts that we have got regarding problems that we had - we find from other divisions what their policy is in regard to that - but, as far as knowing what overall policies are of other divisions - I'm honestly quite ignorant.

I: I'm not sure that this study will generate what policies are - but this study should generate some information about how trustees think about policy and the policymaking process.

R: Right - I perhaps got off track there, but what I was getting at about not having been exposed to their policies - I think that by viewing policy it gives you a little bit of insight as to how the thinking is that is going to formulate such a policy and that's sort of what I meant was that - I really don't know of other boards- what their ideas are with regards to policies because I have not been in seminars or anything where we've had discussions of this type of thing.

I: Ok. Do you feel that the questions that I've asked you are appropriate for gathering the kind of information that I'm looking for?

R: I think so - it's - you've made me in the last 3/4 of an hour think more about policy - sit down and formulate my thoughts at least about policy more than I have in the two years that I've been on a board - indirectly in formulating policy you're using these things but to actually come out and verbalize it and clarify in my own mind - I think it's been very effective in that way - I think the questions have been excellent.

I: Ok. Is there anything that you'd like to add which you feel is important to the study and which would give me a better insight into your views of policy and policymaking and which I haven't covered?

R: Ok - we've touched on it slightly and - in the short time that I've been on, I've become very frustrated at government influence upon policy. It seems to me like it's the ultimate influence upon policy and I recognize the fact that the guy who pays the piper is going to call the shots but - I'm sort of in a panic situation in that I see at every few meetings, another directive or another regulation coming out that I feel is inhibiting our local autonomy or our authority and ultimately our ability to make policy - and it really scares me if we get to the point where there

is enough government control that you have a Manitoba Schools Policy rather than a XXXXXXXXXXXX or a AAAAAAAAAA School Division policy - because I think there's such wide differences from one area to another - ethnic backgrounds - goals - expectations - that it seems completely unrealistic to me to have an overall Manitoba school divisions' policy - but the way things are going - although it may not be directly dictating policy through grants and through changes within the act, I feel that we're slowly coming to that and unless the trend is stopped or reversed - I'm very much in fear that our power to make and implement policy is going to be nil down the line.

I: You're basically re-affirming your earlier position then that policies are - again I use the word tools - for accomplishing objectives, goals, and you're talking about disparate goals across the province.

R: Right. There are certain objectives that we all have in common - we all want to put out a reasonably well-rounded educated person and so forth - but within that there are a whole mosaic of - I suppose morals and - we're not as a school division trying to dictate the morals of our students - but I certainly think that within the policies that we have, we help formulate things that are acceptable to our communities - what is acceptable morally in otherwise behavioral wise within one community isn't going to be

acceptable within another. If I can give you the example of the BBBBBBBBBB situation where the rock band was coming down for a noon concert. Well, I think here, that would be perfectly acceptable. Obviously a good number of the people in CCCCCCCCCC didn't feel that was acceptable and I think that's their right and I would hate to see that power eroded. And, if you curtailed the policymaking you won't be able to have those differences anymore.

I: Well, thank-you very much for all your contributions to this, I appreciate it very much.

R: I hope it's been helpful in some ways.

TRANSCRIPT # 12

I: I wonder if in your own words you can tell me - what is policy as it pertains to school divisions?

R: Policy - I believe - reflects the intent - the framework - in which school boards operate. It sort of articulates, I think - considering a number of factors - again I guess one would have to be specific as to what you were addressing - but, it defines, I think, parameters of operation, direction, planning, for all employees in a school division. Policy applies to both professional and non-professional staff as well.

I: Can you think of an example to illustrate this defining of parameters?

R: Well, I think with respect to say to bus drivers - we have a policy in our division which articulates that if a driver, for instance, is involved in an accident where there is property or injury - then there are certain procedures that are taken by the board and the administration with respect to that driver. That's set out - every driver and every employee and trustee at the division knows what to expect in that eventuality. There are also policies

in the education realm with respect to student deportment and what's expected of a student in our school system here and what may in effect happen if violations occur of that policy.

I: Are you equating this with rules - regulations?

R: I don't think that it's rules in as much that a specific school might have rules. There are rules obviously. For instance - smoking in this division is - comes under a policy but it is also a rule at the school - and so there may be some overlap there between rules and policies.

I: Is there any difference between policies and goals or objectives or desires?

R: Yes there is. Here, with our board, we articulate a set of goals each year that are specific to the board. Some of them involve obviously the co-operation and involvement of all or some of the staff in the division. Others are specific ones to the board. They may not necessarily be policy or even become policy.

I: Is there any connection between policy and objectives or goals?

R: It's interesting when you talk about policy - some things, I think, are written - obviously we have an up

to date policy manual that sets everything out in writing. There are other things that are - policies that are perhaps unwritten - you know - in as much that in this division we try to always maximize the tax dollar that we have - so you might say that we're very frugal - and yet, there's no written policy to say "XXXXXXXXXX school board is a frugal school board." We just try to practice good fiscal management - and yet it's not articulated anywhere in a policy - it's articulated in a goal to maximize the dollars that we have to work with - and I think that's always been an unwritten policy of this division.

I: Ok. Why do you hold the view that you do about what policy is?

R: I think that it's better to have policy for all employees of a division because it offers a framework - it offers a purpose - it offers a purpose in and under which people work and perform and carry out the mandate that they have.

I: Is this something that you've come to realize or is it something that you had when you first became a trustee ?

R: No - it's not something that I've held since I've been a trustee - as a social worker, I guess I've been involved with policies for years and I know what it's like

to work with policy as a social worker - you know - we have certain standards and policies in this province with respect to the care of children. We have policies with respect to adoption services - foster home services - and child protection - and I've always wor... - so, through that experience I've found that it's - it has a - very sensible to have these things. So, I've been able to - as a trustee - perhaps bring some of that experience and influence to school board matters as well. It seems to have worked in many areas. I think policy is not something that is arbitrarily layed down - we like to consult with the people that are going to be affected by any policy - to have their input.

I: This leads into the next question that I had - that is - your view of policy and what it is and what it should do, does that affect the way you approach policy-making as a trustee?

R: There are some times when I guess that I personally would like to see certain things in policy - that doesn't gain the support of other policymakers - trustees, administration and so on - however, I expect that that's to occur in any democratic process. I guess you win some and you lose some when it comes to developing specific policy. Other people have wisdom on this too, and I have to respect that.



I: I think that you've already answered this, but do you think that policy is necessary?

R: Oh definitely. In the trustee position - I guess as management people, I think it's essential for trustees to have policy, but I also know from my experience as a trustee that staff of any school division want policy and welcome policy because it articulates where the school division stands on any particular matter. So in that respect, I think it's necessary and welcome - unless there are people who object to it - and you'll always have that I guess.

I: It sounds as if you're saying that one of the reasons that it's welcome is because it's useful - it serves a useful function?

R: It defines things a lot more - specifically for people. Otherwise, I think, if you have a vagueness and things are subject to the whims of interpretation of whoever happens to be around - then I think that that creates - can create division - it can affect morale - it can affect the whole thrust and operation of the school division - or any organization for that matter.

I: Ok. This notion about the necessity of policy, is that something that's changed for you over time?

R: Well, speaking more globally, I think that probably a lot of school divisions have not had policy -

have not had policy manuals. Perhaps a lot of policy has rattled around in the heads of administrators and trustees - you know - without being set down formally. That's something we set about to achieve here - five years or more ago - in the XXXXXXXXXXXX School division - was to set down what was unwritten policy into written form, and also to specifically address a lot of issues that weren't articulated in policy - and to do that, we borrowed from other people too. Some things have to conform to law - such as your Public Schools' Act and the School Administration Act and so on - and we've had to ammend some policies in order to conform to law - but yes, I think it's been necessary - it's been very helpful - and we've changed. We reviewed our policy manual just this past summer, when we took a complete review of the manual - we updated some - we dispensed with some policy, and we ammended some to conform to the recent ammendments to the Public Schools' Act.

I: So what you're saying is that your belief in the necessity of policy really has affected how you have approached policymaking in terms of review and updating and that kind of thing?

R: Yes. Yes. Uh huh.

I: Should policy be written down?

R: Perhaps so in a case where you have a very significant turnover of either administrators or trustees. Traditionally, I think, there's always enough people around to retain the knowledge - much like tradition, I guess, was carried down through generations - being unwritten but sort of carried through - then I think, you know, you can get by without it being written - but I think in most cases it should be written down for new people who come on board - either as trustees or teachers or bus drivers or whatever.

I: Is there any advantage to not writing it down?

R: I don't think so - I don't think so. If I could be specific for instance, an unwritten policy that we have here in this division that may sound rather insignificant but - in the context of sort of social changes and attitudes - and that is with respect to pregnant students - You know, I've been around long enough in social service work to know that when a girl got pregnant, she was removed from not only the home, but the community and the school. That attitude has changed. We have students in our school system who are unmarried and pregnant and continuing their studies - and we have a policy which of course endorses that and assists them in any way to continue with their education and even if they have to leave the school system, to effect some kind of an arrangement for them to carry on with their studies. Yet, that does not exist in policy. It's an

understood thing by staff - principals, administrators, and probably most trustees, but it's not written down.

I: Ok. Why would you not write it down?

R: Well, I guess I'd have to speak personally on that - I wanted to see it written down, but I didn't gain sufficient support to have it go into policy.

I: So there's some reluctance somewhere to incorporating it into a written policy?

R: Yeah. Yeah.

I: Well, if it should be written down, is there any specific kind of way that it should be organized? You mentioned a manual - any kind of guidelines as to how it would be organized - in a manual - should it be in a manual or in minutes or...

R: It would go into our manual - any policy that we adopt as a policy goes into our manual and we have it sectionalized pertaining to various aspects of the total operation - so, something like that would probably come under education - they would have a section in there with the appropriate number attached to it saying "Education for Pregnant Students" or something of that nature, and it would just simply outline that a student should continue just as long as possible and if it is accepted, then whatever is needed for them to complete their studies...

I: Am I correct in assuming then that ordering and organizing of the written policies is done or should be done in a catalogued kind of format which makes it easier to find things?

R: Yes. We have a - I think our manual is set out very well in that respect. It's indexed into certain sections. It's all color coded to correspond to indexed pages and so on - so it's very easy to find things in it - and we also provide sections of it to those employees who are affected - pertains to the teaching staff then they get that portion of the manual - bus drivers have their section - maintenance people have theirs and so on.

I: Who makes school division policy?

R: I think policy can be initiated pretty well from anyone - ultimately trustees are responsible for endorsing and sort of engraving - if you will - into official policy anything of that nature. But, my experience has been that policy can be initiated by anyone. Bus drivers have legitimate concerns or there are issues that affect them, then it's almost always brought to the attention of the board - committees may look at it and they would probably consult with affected people and if the policy is necessary or some ammendment then the board approved it in a formal meeting - then it goes into the manual.

I: You mentioned earlier that there were - you made reference to other policymakers such as administrators etc., and that's sort of in keeping with what you were saying - well, accepting that your view is that a whole bunch of people should have input and thereby take part in policymaking - is there any limit to the input that these other groups should have?

R: I don't know about limits Ken, I would think that we would like to have as full a participation as is necessary to developing any policy. We're not going to go out and canvas the community obviously, but those people who are appropriate to these things are certainly consulted and involved. There's a twofold purpose - first of all it gets you a policy that may be helpful to everyone and also, it's good for staff relations as well. So, at some point I think you have to say "Well, I think we have enough information. We're going to adopt a policy and here it is." I think that's a board of trustees' responsibility.

I: You mentioned appropriate people - how do you define who's appropriate?

R: Well, - for instance - on a department policy that we just developed last year - it's now a part of our policy manual - this affects behavior of students in our schools. We talked to principals, we talked to teachers, and then we might even talk to bus drivers because they cart

these kids around every day - so obviously they're appropriate people - you know, if it comes to behavior on buses then we will talk to drivers - we will talk to school principals.

I: How about the students themselves?

R: In some instances we've consulted with the student council representatives. We recently developed a policy with respect to student council funding - that involved input from the students themselves plus the administration plus trustees - and from that we came up with a policy.

I: So it seems that your definition of appropriate people is really the people who would be affected by the policy...

R: The most directly affected. I think that trustees also have to be alerted to the fact that they represent the taxpayers and obviously you have to be sensitive to that too. As I say, we're not going to go out and canvass all of the taxpayers but - we know that we're elected and we represent those people so, you have to be sensitive to that - if something's going to cost a lot of money, and while it may be great and welcome by the affected people in the school operation - we may say "Well, look - I don't think our citizens are ready for this" or "It's going

to cost too much." We may have to modify or deny it - yet in effect, it may be a good policy in and of itself - so there's the cost factor and the impact that this will have on the community.

I: Ok. What's the role of the individual trustee then in policymaking?

R: Probably directly related to your eloquence and ability to persuade. Individually, I don't think anything beyond the fact that if you may have strong convictions and good evidence about certain issues, then that might result in policy - I don't think you do as an individual trustee - you know. I don't think that any one of my pet things is necessarily going to be adopted - you know?

I: I agree but certainly you have a role in policymaking because it would - if the board is a non-entity and it's composed of people called trustees, then it's those people that are really going to make policy...

R: That's right - it's the corporate body.

I: So what is the individual role in ending up with this policy?

R: I think that trustees individually can initiate - you know - discussion on what they may see as a need for policy change or a new policy. I guess my partic-



ular inclination is towards student welfare - I'm very much oriented towards student needs - I don't think very well in terms of buildings and maintenance and the technicalities of plant operation - nobody would expect a policy from me on that - but with respect to something like the unmarried parent that I mentioned - self esteem of students in the school - the school attendance committee which is something I initiated - that's my particular bent and individually I've brought these things to the board and fortunately for myself, I guess, people have accepted that and it's become - certain things have become policy.

I: So are you saying then that the role of the individual trustee is somewhat of a watchdog role in areas that have a particular interest, or of concern or of expertise to themselves?

R: Yeah, I think so.

I: You expressed that virtually everybody in the school division has a part to play in making policy - has this view changed since you first became a trustee?

R: I think it has. I think it's changed to encompass perhaps more discussion and more people. I can remember a time when I was first a trustee, where things were perhaps arbitrarily imposed - not much consultation - and, unhappily I think, we regretted that in some cases.

So, I guess out of an abundance of caution, one tries to consult with those people who are going to be affected. I think it works better.

I: That was my next question. Has this affected how you approach policy - obviously it does - you say you're more cautious.

R: Yeah - I don't like to develop a policy that has to be rammed down people's throats. I like to assume that first of all, you're dealing with intelligent people until proven otherwise, and therefore, let's get something that's going to work for the benefit of - not just of the adults - you know - I think we're here to serve kids - that's always been my focus - how's it going to better our children educationally? - administratively? - you know - as far as school operations are concerned.

I: Ok. Well, how are policies made - and by that I mean what are the processes or procedures - perhaps the steps involved from beginning to end in the formation of a particular policy?

R: What are the steps taken?

I: Yeah - what are the steps from the beginning to the end in the formation of a policy?

R: I guess if I relate it to a specific thing Ken, I could take you through that. Again, I would have to go back to our policy - the most recent policy on student department - ok. I would say that that's evolved over discussions - both formal and informal - by trustees, board, teacher meetings, board - principal meetings for the past year or two years - where you begin to receive feedback to the effect that maybe we need to be a little more tight in some areas in terms of school behavior - in the schools and on the buses - changing attitudes of kids today - lack of response and interest by parents - all this sort of begins to work on you - you know - and you might take an attitude of throwing up your hands and saying "Well, that's the trend today", or you can say "Let's do something about it." So, I think it started to come together when the administration and trustees probably had enough of this feedback that we were impressed with the fact that we needed to try something. So, having done that, then we came up with some points - took that back to principals and some teachers - bounced it off them for a while - came back - talked about it again - wrote it up - knowing that it had first of all, the support of the principals of our schools who are ultimately going to have to enforce these things - plus their own staff - and then putting it into a formally adopted policy by the board - and it goes out and then, the final result of that was that we sent a copy of it to every parent

- every home in the division. So, like I say, in that particular policy probably - it was two years in the thinking and maybe six months in the making - you know, to formalize it.

I: When you talk about making part of it - there's just one thing I'd like for you to clear up for me - the time spent in discussion - what goes on in discussion? Do you just talk about it or do you evaluate it or are you doing research at this time or what's going on?

R: Well, I think that a lot - some discussion occurred outside of the board - back to our superintendent who was aware of some of our concerns - and obviously we've discovered that there's been concerns by principals - so they have discussed it in their meetings - the principals here meet regularly with the superintendent. Over the years we've had discussions - not with the idea of formulating this policy, but with staff who have expressed concerns about behaviors in our schools - and from that I think we talked about it as trustees - why I know one time we just closeted ourselves - which we do once or twice a year - the board just goes off somewhere - we had dinner together with the superintendent and the secretary-treasurer and we just have a very open, frank discussion about things that are on all of our hearts - and a lot of that discussion occurred at that meeting which was last year - and from that we worked

on the policy over the summer - and came back and that was that so - there's a lot of talking - a lot of discussion.

I: Ok. What kinds of things influence how policy is made? I think you mentioned, for instance, that trustees are aware of their electorates - that was one thing - are there any other things that are significant in influencing policy?

R: The ideal is that trustees are alert and responsive and responsible - then - and know what's going on - not only in the schools - and by that I don't mean every nth detail - but a general overview - sort of the pulse of your school system - plus what's happening in your community - and I think that you begin to respond to certain things - I guess I can think of a specific point here which was - this division has piloted driver training for 15 1/2 year old kids. Well that thing was germinating for a long time before we ever got the attention of the government and eventually - and their endorsement of the program - to the effect that I for one and others were concerned about the fact that too many kids 16 years of age were killing themselves in automobile accidents - and we talked about the fact that in over about a three to five year period, there was eleven of our students between 16 and 18 in this division - were killed in auto accidents - and we know enough about the driver training program to statistically prove

that it has prevented auto accidents and produced better drivers. So, we began to push for this - it was not just those kids that are sixteen - they can get a license - they don't have to take driver education - we were providing an incentive for them to do it, by offering the chance to drive at 15 1/2 if they took the training - but it was a good response to that - so, you know, that's sort of being sensitive to what's going on around you and that, I think, is what influences policy eventually.

I: So basically being sensitive to all things then.

R: I guess no one trustee can be sensitive to - but I guess that's where it's nice to have the corporate body - we've got trustees who are sensitive to transportation systems - they know the every nut and wheel of the thing that turns - you know - and I appreciate that - and so they would formulate or initiate policy that I would never think of.

I: How do you know when a policy needs to be made or revised?

R: I think when it's no longer effective - that is what trends and changes systems - have altered to the point where the policy is unworkable.

I: Can you give me an example perhaps?

R: I can't offhand - I'd have to think about that.

I: Ok, that's fine. What you've been describing to me is your view of the policymaking process - how have you come to hold those views?

R: I guess just experience over the years with both working under policy - not only professionally, but also as a trustee.

I: Ok - and - well I won't even bother to ask you if it affects your approach to policymaking - I think that's what you've been saying all along.

R: Uh huh.

I: Ok. Maybe you can outline for me what you consider to be the attributes of good policy. What is it that specifically characterizes the policy as being good?

R: When I think it works for the majority of people - you're not going to get a 100 % response to any policy unless it's - they're earning more money or something - but I think where there's not only the - I think you have to think of the common good - if you will - of any organization - the welfare of an organization - especially in schools where we're in the business of children - I think a good policy is one that enhances the objectives that you

have as a school division - enhances the goals or helps to fulfill those goals which ultimately is to prepare the products - which is our kids - for whatever expectations we have of having gone through our system. Maybe that sounds rather lofty but it's - I think it has to work. It has to be well oiled - that it provides parameters, yet may have some flexibility for specific cases - I don't think that policy necessarily has to be etched in stone, but it should be malleable enough to work for the benefit of most people.

I: Ok, you talk about a well oiled kind of mechanism - are there other specific elements that go into making up a well oiled mechanism?

R: Well, there seems again to exist - for instance - in terms of specific cases of compassionate leaves for instance, of staff - there are certain things that are defined in your collective agreement. There may be things that aren't defined in the collective agreement - if you can deal with - that you have to deal with under policy - written or unwritten. So, you examine specific cases and you sort of decide on the merits of that case - rather than applying the exact letter of the policy - that's happened in a number of cases - that's the only example that comes to mind right at the moment.

I: Maybe it would be easier for you to view it from the other end. What would constitute a bad policy? Or, I should say, what would characterize a bad policy?



R: If it's not well defined - there's opportunity for misinterpretation and it is not a good policy - it's a bad policy and it should be changed. I think policy should be clearly set out so that everybody can understand exactly what it is you mean - I have no patience with vague sorts of wishy washy policies. I think they should be scrapped. That's probably the technical part of it. From the content, I suppose a policy is a bad policy if it is unworkable or if a majority of people find it hard to enforce because circumstances have changed. We have to change policy, for instance, to reflect increasing costs - material, personnel, transportation - so we're always having to update policies to reflect that. One of the reasons for the changes in our student council funding was because - maybe it's because we have a lot of involvement but - it's costing so much money to send kids to Reach For The Top in Winnipeg for instance - or provincial competitions in volleyball or basketball or whatever - it costs money - you set down a per diem rate, it's no longer workable. You can say "Well, you can live with it" and you cut back and they can't go here because they've won, or you send them out on the streets and beg for money from door to door - so you have to reflect - you have to work on other ways to meet that need, yet within reason - so...

I: Ok. How have you arrived at these conclusions about what's good policy and what's bad policy?

R: I think the years of experience as a trustee and also years of experience as a social worker - I guess I bring my professional aspect to it - I know which policies are not working or are working in the field of social work - and I also like to have some influence on that as well. Being sensitive to those who are affected by policy - plus as a trustee to your electorate.

I: Ok. How do you - well first of all, before I ask you - well maybe not - how do you evaluate whether a policy is good policy or bad policy? Is there some measuring stick?

R: I think it goes back to being informed Ken, as to - you know - first of all - those people that are affected by it - those people who are indirectly affected by it - if there's a cost factor involved - I think you have to test that out in terms of whether it's still working or not. Usually you change policy if you get some kind of representation to the effect that it's not working - or you may simply look at it - it could be a very innocuous sort of policy that it doesn't really maybe matter too much here or there if it becomes sort of antiquated - you know - but - so you may change it - not because people are up in arms about it but usually it just simply doesn't apply any more - so you either scrap it or modify it or whatever.

I: If policy is working, do you evaluate it?

R: Yeah - as I say part of what we did last summer was to evaluate the whole manual - all of our policies.

I: Almost a "zero-based policy making process"?

R: Yeah - and we would say "Well, there's no problem with this - it's working - we'll leave it." I guess that's a sort of tersary review but - when you're confronted by obvious changes, it has to be done - you know - 70 % of any manual you could probably leave fairly well intact for a number of years.

I: Ok. Does your viewpoint of what constitutes good or bad policy affect how you approach policymaking?

R: Uh huh - I think one has a philosophy about policy.

I: How does it affect your approach to policy?

R: Well, I never have been an arbitrary person although I guess in some ways I'm decisive - I like to make decisions and I like to make them in the light of consideration of all the facts so - I guess in that respect, if it doesn't fit in to that - you know I've lost my train of thought - sorry about that - I'm getting off the track - maybe it's the hour or something.

I: You said that certain things make good policy - certain things make bad policy - you talked about some of the mechanics of policies such as clarity and lack of room for interpretation - well, feeling the way you do about these being elements of good policy or elements of bad policy - does that affect your approach to policymaking?

R: Yeah it does. How does it affect it? I guess I'm sort of a participatory democracy kind of a guy - you know - that's the way I like to work - as I said earlier - some things where you have to make a decision - ok? - and in that respect I'd say I'm decisive but - where there are areas I think - I like to consult - I like to have a sense about where people are coming from - maybe it comes from being a social worker - you know where you try to identify the problems that people have and so on - so in that respect, I think, I bring that particular influence to policymaking.

I: Have you had any particular experiences as a trustee that have shaped your views about policy and policymaking - ones that stand out in your mind?

R: Yeah. As a trustee?

I: Yeah - as a trustee first off.

R: I guess I can't think of anything as specifically as a trustee - I made mention of the attendance

committee Ken earlier - and that I think came about as a result of my work as a social worker so - from that perspective I think I brought it into the school system through the committee structure that we had set up here - again with a view of a concern about students. That's why I'm a trustee. I'm here number one as a trustee to be for the benefit of the students - probably secondarily to be a good administrator of tax dollars. Other people I think have it in reverse, but - I guess just working with kids as I have for twenty-two years has probably done more to influence me in policymaking and the philosophy I bring to policymaking - so, it's what I am outside of being a trustee that sort of enables me to bring it into the trustee arena and thereby initiate or influence some policies.

I: Ok. This research that I'm doing is concerned with how trustees think about policy and policymaking. I feel that the way that trustees view policy and policymaking might be influential in determining at least in part, the kinds of policy statements that eventually emanate from the board. I just wonder how you feel about that statement - how you react to that?

R: I think that's true. I think that some trustees probably are reluctant to get into policy discussions - have difficult times being decisive or articulating something in policy - I guess I respect that, but I've never had

any problems with that personally - I rather like to look at policy issues - but I think traditionally - maybe to their peril, trustees have avoided making policies or - it becomes vague and sort of ebbs and flows with whatever the situation is at the time. I think that's disastrous - I think it's destructive - sort of situation policy - you know - situation ethics kind of thing - whatever goes at the moment - you know - and I think that's wrong. There ought to be some continuity irrespective of changeover in trustees and administrators and so on - there ought to be some sort of like a constitution if you will that's ongoing and yet subject to change.

I: To give you an example of what I mean - it seems to me that trustees come to the table not as blank slates when they're going to make policy - they must have some views about what policy is or should be - what it should accomplish - how it should be structured etc. - and I just wonder if perhaps a way of better understanding policy and policymaking in school divisions in Manitoba is to first of all understand the sort of "pre-set" of ideas that trustees bring with them.

R: Yeah.

I: That's what I'm looking for in this study.

R: I don't think there's enough probably - training if you will or discussion on policymaking. I think it's great. It can be a very sophisticated process - I think it's a vital process - one that maybe we don't really define that much as a corporate trustee body. Some boards I think, are better at it than others - some I think are pretty poor at it.

I: But you see some validity in this idea - I gather that's what you're saying?

R: Uh huh.

I: Ok. Well, the next question is kind of similar to this - do you think that this type of research is worthwhile?

R: The research into ?

I: Into the views that trustees have about policy and policymaking.

R: I think it's very worthwhile. It's our responsibility - you know - I think that we have to be reminded and remind each other that we are policymakers. Some trustees like to be doers in the respect that they like to be watchdogs - you know - and - if you will - almost meddling in waters that they have no business treading in. I'm not interested in that - I'm interested in policy and if

you set out a good policy, then you don't have to be the watchdog - you know - because if it's a well oiled policy, then things should be running smoothly by and large. So I don't have time to be otherwise.

I: Ok. Do you think that the questions that you answered today are appropriate for getting at your view of what policy is and what policymaking is all about?

R: Yeah - I think they're appropriate - I think you're digging particularly intensely at how we - sort of what values or philosophies we have that influence policy. I know you've made me think about that - you know - and I think that's good and probably something that more people should think about - you know - we all have our biases - you know - and obviously they're going to affect policy. Maybe it's fortunate that there are other people who have other biases and it's out of that that you sort of arrive at an acceptable kind of policy. I've had to modify mine - I've gone into meetings with what I thought was a pretty well oiled attitude or policy idea - I've had to modify and with good reason - because other people have suggested thoughts I hadn't been considering so...

I: So at least I should get a glimpse - a partial glimpse of what you hold to be your views on policy?



R: I think that if you can get people to think beyond their own biases and prejudices and pet hobbies - some trustees have got on the school board because they have a hobby or an axe to grind and I don't think it's any business - you know - a person being there for that reason - If you can sort of engender the idea that we have to look at other things - we have to be sensitive and responsive to those people that are affected - you know - I've had to adopt policies that I personally wasn't all that happy with but considering the corporate thinking of maybe the common good - I've been able to go along with it.

I: Is there anything that you'd like to add that you feel is important to this study and which you feel I haven't covered in the questions?

R: What can I say - without being critical - sometimes I get a bit cynical of my fellow trustees - and I'm not just speaking of my own board but I've been to enough meetings and conventions and what not to have some rather strong opinions about it. I think we have to get away from being myopic - I think we've got to be futurists to some degree as trustees - and I don't think that trustees should be soothsayers, philosophers and all things - you know - I mean - we're people - we're just citizens of the community. But, I think in some cases that we should be a little more sensitive to issues that affect students - that

affect our education system - not just thinking for the present - but the future as well - you know - because ultimately policy is going to have a ripple effect. I don't like to bind the policy on future trustees or future schooling - that's not good. So, if you're always having to change policy, then I think, probably it's not good policy - you know you're not putting sufficient into it. So, I think trustees should - in many ways - think, observe, digest and discuss before they start answering these things in policy.

I: Ok. Well, thank you very much for your time.

R: Ok.

TRANSCRIPT # 13

I: In your own words, I wonder if you could give me your view of what is policy?

R: Policy is to me, something which gives direction and - a philosophical sense I suppose - to a school division - a school district - or whatever the case may be - and something which is taken by the people that you hire and interpreted and put into action to make that school division run to the ends that you want it to come to - I think.

I: Ok, I guess from what you're saying that it's somewhat loose - there's an element of interpretation - you talk about it being somewhat philos...

R: Well yeah, I suppose there's a stricter sense to it too because we do develop policy that says - you know - you do a specific thing - and I suppose that there's that aspect to it too but I think in almost any policy that I see being developed - there's always that interpretation factor there - and I think of instances where administration puts a policy into effect and then we get a query from a taxpayer saying "Hey, what are you doing here?" - and we have to come back and say "Whoa - this is what we meant, not this sort

of thing." I suppose that sort of comes back to - maybe not quite stating in policy what we really had intended - which I think is maybe one of the shortfalls of a board - that I see.

I: Ok - so it - to sort of sum that up, there is room for interpretation but it is not necessarily a desirable thing?

R: Well...

I: I don't want to put words into your mouth.

R: No, I know - ok, in some places - I suppose in some cases it's a desirable thing - because I think you have to have room in policy for the people that work for you to be able to put it in effect with some initiative and - what's the word - imagination of their own eh? - you know to come up with the end result - and of course I believe that if you have a philosophy that - of education for a division to begin with - and then your philosophy of direction secondly sort of thing - and then you have people that you've hired - and hopefully you've done a proper job of it so that they put a little bit of imagination into the interpretation of it - and yet still go the direction that the board is intending if that's - that's kind of a tall order sometimes maybe but then - I think you're going to come up with a system that's probably going to work maybe pretty

good - because you've got not only bare bones policy as determined by a board sitting there, but you've got people that are - thinking people that are putting it into effect with some imagination - that's kind of important.

I: Ok. Can you give me some examples of policy?

R: Oh goodness - ok - transportation for example I suppose - which we have quite a bit of in rural areas eh? - that certain rules and regulations must be followed for children riding school buses as to conduct or what they can bring aboard - that kind of thing. I suppose another thing is - where schools are concerned - is to - a broad outline of what we expect from different categories of schools like a collegiate for example - what - the parameters that we give to what the principals are allowed to work within I suppose - and elementary's maybe a little less broad as far as restrictions are concerned - that kind of thing. I think that's - do you want specific examples?

I: No, that's fine - that's no problem. These things sound to me like - in some instances and possibly most instances - I don't know - that they would be rules of procedure or things like that - and when you talk about interpretation are you talking about when you haven't clearly stated rules 'per se' but rather the general desirability of something - is that where the interpretation comes in?

R: Yeah - I think so - you know - and I think it's kind of important to leave room for that. It's fine to have a certain amount of specific, strict rules I suppose, but I still think that in order to let the people that you hire and - particularly when they're professional people - to gain their full potential, that you have to allow them some room to expand and work within it sort of thing.

I: Is there a distinction or difference between policy and say goals or objectives or desires of the division?

R: Well, I suppose the goals - you know - I think a division - and I guess - it's not something that I could say for a fact, but I think that probably a lot of divisions in Manitoba - or maybe anywhere - don't probably set out goals as one of the first things they do really. You get into the nitty gritty of deciding whose kid's going to ride what bus when you really shouldn't but instead you should be thinking of goals. And I think that - you know - you establish goals but I think that there's a difference there - the policy is something that hopefully will direct you to those goals but I don't know how you can really set out specific policy to say - you know - that's where we're going to end up - because education to me is a people thing and there's always that variation thing in there that I think is going to affect whether you reach those goals or not - and of

course policy - direction by policy can have an effect on getting towards it - but I don't think it can be...

I: But there is a relationship or there can be a relationship.

R: Yeah - I think there can be a relationship, yeah.

I: How have you come to your particular viewpoint of the nature of policy? How have you arrived at these views about what it is?

R: Well, I don't know whether I can pin that one down or not - you know - I've been involved - of course I've had children go through the system and I still have one in the system - in the elementary/secondary system - a son in university, but - I suppose as I watched things happening over the years and got involved with parent groups and the like in the schools that my children went to - I sort of developed a sense of what I thought the goals of a division ought to be and sort of how they should be attained, and I guess of course - when you get involved - actually becoming a trustee - you have a responsibility to try and develop a system and a program - or continue to develop a system or program that's going to produce what you think ought to be produced. So, I suppose it's been sort of a lifetime process in a sense of sort of coming to the viewpoint that you do.

I: So I gather then that your views about what policy is has changed since you first became a trustee?

R: Oh no - I don't think so in that respect particularly - I was involved with a parent council or PTA - that kind of an organization before I became a trustee and we were involved in making representation to the board at the time concerning policies that they had that were in our opinion affecting our students or not affecting our students. So, I guess that helped me develop what I felt policies should be and what goals we should be kind of looking for - but I don't think that I've changed my thoughts about what the goals should be or what the policies should be - particularly since I became a board member.

I: Ok. The way you think about policy or what you think policy is - does that affect how you approach policymaking?

R: Well, yeah - I think so and I guess I'd sort of have to give you a bit of an example to point that out. I think most schools in Manitoba over the last number of years have moved towards centralization and I think that it had to happen, of course, from the one room school that I attended as a boy - to attending school in a town of six hundred, I suppose, to centralization to the point of where in the division of XXXXXXXXXXXX, which is a big division area wise - we have one major centre and two smaller ones with



high schools. But, I think that the point in time sort of came that people have said "Whoa - centralization has now had its day - it's now time to consider that we must provide the same kind of education in a smaller school even though it may cost us more dollars in that school, as compared to the more urban type setting - in order to give everybody an education without taking everybody miles and miles and miles." So I think that the thing I'm saying is that - you know - that now has come the time to change philosophy and change policy to promote maintaining at least what we have as far as schools in the different areas - even though that little one out there may cost us more in dollars per student than the bigger one in here - but yet still to try and give the kind of a same opportunity of equal opportunity I suppose.

I: And so really it's - your viewpoint that policy is direction and reflects philosophy etc. - what you're saying is that you have a specific direction and philosophy about education and that's now causing you to approach policymaking in a specified way in this situation.

R: Yes, I think that's true.

I: Well, do you think policy is necessary?

R: Oh yeah - I think it's necessary - you know - direction of one kind or another in any corporation I think

is necessary because you know, if it were only one person, then I suppose that person determines his own direction and goes that way - but when you've got a number of people, then I think that somebody has to set a direction for that group to be going and - well ok, I suppose from the top down it's originally your minister of education and your board of education and your school boards to your employees eh? But - and you do get some of that in curriculum etc., etc. But, as far as the local direction I suppose - you know - I think that that has to be - it has to come from your board.

I: You couldn't function without policy?

R: Well, I would - well I suppose you could function without policy, but it seems to me it would be willy nilly, here and there, all over the place.

I: So it's the quality then?

R: Yeah, yeah - you know - you'd have to - you'd be - everybody'd be going in their own direction if there wasn't some central policy I suppose - that would be my opinion.

I: Have you always felt this way about the necessity of policy?

R: Well, I think so - I really can't visualize how you would come up with - ok - even within your own divi-

sion that - without policy and giving some direction it seems to me that you would end up with kids from one school coming out with certain qualifications and kids from another school within the same immediate area coming out with entirely different qualifications altogether - it would just depend whatever those particular people that were working with those children chose to give them.

I: Ok. Well, this feeling that you have that policy is necessary - does that viewpoint affect how you approach policy?

R: Oh, I don't know - that's....

I: Well, without putting words into your head, I just wonder - does it make you more determined for instance...

R: To make policy? Oh no, no - I don't think so - I think that - you know - you start out, I think, with a general policy for the division and then you - as the need arises - and I think that you have to try and to keep abreast of it - and I guess that's why you hire people such as your superintendent I think, to let you know that here looks like a situation coming that we're going to have to have some direction on, so you guys had better start looking into this thing, and develop some policy to govern it before it happens sort of thing - you know. So, I suppose in that respect you establish policy sort of ahead of time but...

I: But the fact you feel that policy is necessary doesn't really particularly influence you then - in how you approach policymaking?

R: No, I don't think so - I think you have to take a look at the situation that you're going to be governing or affecting by giving direction by policy - and try and determine what - I think - what bare bones policy you need initially and - ok, if the situation arises where you see you need a little more direction than what you've given originally, then maybe you make a little more policy - but I'm one that likes to sort of give as much scope to professional people as possible because I think there's a lot of potential there that sometimes we're not using.

I: Should policy be written down?

R: Oh yes, I think it's rather important that you - otherwise you - it's - you know - I guess word of mouth is fine and that but if you don't have it written down then it's hard to let people know what policy you have developed that's going to affect them - and I think it's one of the things that we need to be doing regularly as far as - well keeping people within our framework informed because - one of the things I tend to think is - as one of the faults of a division or school division or something is that we don't communicate enough back and forth so that everybody knows what's going on and everybody is more at ease. If all of a

sudden out of the darkness sort of thing comes something - and gee you never heard of it before - I don't think that's a good situation if you're in a situation where - ok, I as a board member make policy and the first thing I do is circulate it to all the people in my division - they're going to feel much more at ease and less threatened by policy that I make.

I: Is it possible that policies exist without being written down?

R: Oh yes. I think that's so because - I suppose maybe in connection with policy that's already been made - we tend to maybe discuss it at a board meeting and say "You know, this is the way it's supposed to be." And we sort of come to consensus, but nobody makes a motion or something like that that says "This is the way we interpret" or "This is the way we expect it to be." You know - we sit there and discuss it amongst ourselves and say "Yeah, that's right. That's the way it should be." But then nobody writes it down and it's forgotten until the situation arises where you have to apply that policy maybe and the person that is being - or group that it may be applied against or with - say "Hey, I don't see anything written that says that." "Oh, but we discussed that way back when and that's what we decided." So yeah, I think there are instances where policy is not written.

I: Is it desirable?

R: Oh I think basically - I suppose there are maybe some instances where - I suppose if you were in a situation where you didn't want to really have to apply the policy that was written, it would be better if it was unwritten because you could bend it more easily without maybe having to face the music of the public if you like. But, my firm belief is that if you're open and above board with everything you do with the public, that you know, you have basically nothing to fear - and if they don't like how you're representing them, then they have the opportunity to vote you out the next time around.

I: If policy should be written down, as you're suggesting, is there any specific way in which it should be organized?

R: Organized - what do you mean?

I: Should it be a manual - should it be minutes - is there any...

R: Oh, oh. I think it should be a manual and our particular division is in the process of hiring people to put a manual together of the policy that is already there - because although I've been on the board for better than two years, I haven't a clue of what all the policy of our division is - and I think that there's darn few people in the

division that are aware of what all the policy of our division is - and I don't think that's good business or good - it plain isn't good management in my opinion - it should be there and - in booklet form where it's relatively easy to determine what the policy on bussing students, or students in the school yard, or whatever it may be - as far as the division is concerned - and I think particularly important for a teacher or a principal or as far as that goes, a school board member - because you know - a parent phones you up and says he doesn't like what's going on in the school yard - what's your policy on that - what do you tell him. I'm not bashful about saying "I don't know." - "I'll find out." - but by the same token, if you had policy in an organized fashion, then it wouldn't be near so difficult to and time consuming.

I: Ok. Who makes school division policy?

R: Well, I guess as a trustee, we think we do but I'm not so sure that that's entirely so. I think that your superintendent probably has a very strong influence on what policy of a division is. I'm not sure whether he should or he shouldn't have. Maybe in some cases I would think that he maybe should have because - really he's the professional in the bunch - and if he - if anybody knows how professional matters should be dealt with or what policies should be made to cover those things, then I suppose he should - but - I

don't know - it seems to me that still the trustees - although even particularly in our case - where none of us are professionals - or maybe where there aren't many professionals I suppose - I think a common sense approach even in the case of professionals sometimes is a pretty good kind of a thing to have along with it - so, I would say that trustees, along with the superintendent - maybe even along with the public in a number of ways too - because I don't think sometimes we give our public enough credit for the intelligence and wisdom that's out there - and so consequently we come forward with a recommendation not having consulted our public and it ends up in policy - and then you get accused of - you know - there's no use talking to you guys - you made up your minds already.

I: When you refer to the public - are you referring to the electorate period or are you referring to everybody?

R: Well I think that probably the most important part of the electorate are the parents who have students in school because it's their destiny that we're determining, I think, and so I would think that they should be probably considered as much or more than anybody - and sure you have to give some consideration to the other people of the public too, but - ok, you get some person that is only concerned because his taxes are going higher but doesn't have any kids



in the system and doesn't know or doesn't care what the benefits are that are being reaped - then I feel you have to give him a little less consideration - although he really has the same amount of contribution but...

I: That kind of leads into the next question which is the groups of people who are involved in policy-making - and you have suggested the superintendent, the public - I may be reading between the lines here, but I suspect that you may also be referring to the teachers in areas that might concern them etc. - but all of these groups - how much input should they have? Is there any limit to the amount of input that they should have?

R: Well, I suppose physically there's a limit if nothing else - physically there's a limit because - like I'm - although I get a stipend for my time and that, I still have to run my own business and make my own living - what I get out of it doesn't - you know - it's lucky if it covers expenses never mind anything extra - so, there's only a sort of limited amount of time that I can put into the job so I suppose in that respect then, the amount of involvement by public, by teachers, by well superintendent not so much because he's generally available, but - is limited physically. The other thing is I suppose that - I think the public, whether it be teachers or parents or whatever should have the opportunity to voice their opinions, their feelings

about whatever matter may be before them - and I don't know that in all instances where you make policy, that you can necessarily consult them because I think maybe that's what you are elected for - you do have to make some decisions that you haven't had and couldn't possibly consult all electors on - but particularly in major issues I think - or larger issues at least - I think that they have to be given the opportunity to have their say. And, if there's a very strong direction indicated, then I think that - myself as a trustee - if I'm from that particular area - in order to represent the people that elect me, then I have to put forward what they're saying. If it's a willy nilly - one way here and one way there and one way over there - then I sort of have to accept the comments that they have made and sort of involve that in making my decision.

I: Ok, your answers seem to lead naturally to the next question - what is the role of the individual trustee then in the policymaking process?

R: Well, I think the role is to get all possible information concerning that particular thing out on the table where everybody can have a look at it - that all interested people have an input - and I think then, when it comes down to the final decision as to what the policy will be is to make a decision as a trustee, on behalf of the area that you serve and not - I'm quite strong about this - not

as I may feel - mind you I haven't been put in this position yet but - not as I particularly may feel, but as I feel that the people that I represent feel. And I think that's kind of important - as I say I haven't really been tested completely on that one.

I: Yeah, I wonder what happens when there becomes an almost moral crisis?

R: I guess that - at least I've said that if it's a situation where what I feel is diametrically opposed to what people are saying that I should represent them on - and I in my conscience couldn't go with what they're saying - then I think it's my - I think I have only one choice and that would be to resign and let them elect somebody that could.

I: Ok. I wonder if you can give me an example of a policy that's been made through the input of some groups such as you've suggested?

R: Ok - yeah. School closure policy in our division - and it was a result of the dissatisfaction in our division with continued centralization I think is the way you'd - and people - trustees of the time, feeling that they were much more intelligent, or much more in the know than the people that they represented - and felt that they would decide what was best for the people. The end result was a

committee that went around to the different communities and listened to their beefs and gripes and whatever else, and then came back and as a result put a policy together which in effect sets up some procedures if school closures or movements of grades from one school to another or items of major consequence are concerned.

I: Ok - and so the feedback was solicited from those people who were affected then?

R: Uh huh.

I: Ok. Has your view about who makes policy - the view that you've just expressed - has that changed over time?

R: Oh no - I don't think so.

I: You essentially arrived on the board feeling that policy was made by not only school board members but by ...

R: Oh - ok. No, I guess it hasn't changed - my view hasn't changed. Before I went on the board, that's how I felt policy should be made. I guess I didn't feel that it was being made that way at the time that I went on the board and I feel that it's more being made that way now than when I went on the board and I would like to see it change even more in that direction.

I: The viewpoint that you have about who makes policy and who's involved in policymaking - does that affect how you approach policymaking?

R: Well, I suppose - because if your point of view is that you have to have participation by all groups involved in the system in order to make policy - then it's a longer and slower process than if you feel that you are the only one that really knows enough and has enough information at hand to make an intelligent decision about making policy - which is a much quicker and less - I suppose cumbersome if you like - way of coming at policy. I guess there are those differences but, because that I feel that you have to involve all parties concerned then - certainly I guess that affects the way that I approach making policy.

I: Can you think of a specific example of what you do differently because of your view of who's involved than you would say if you felt that you were alone in that?

R: Ok - yeah, I think I can. At the present time in our division, we're looking at reorganization of schools within the town of AAAAAAAAAA, for example, and also in the town of BBBBBBBBBB where - in the one situation we have presently a K to 8 and a 9 to 12 in the same town - and we have an overcrowding situation because of school psychologists, dental programs, you know - those kinds of things - so we have to sort of determine if we will proceed or recom-

mend a building program - and if we're going to recommend a building program, on which school - and to what advantage. So, we've set up a committee that consists of principals of both schools, an ordinary teacher out of each school, trustees of the area, main office administration, and a couple of parents from each school - and discussing all the different possibilities of how we can reorganize this to the most benefit to the kids and to allow us to make the best use of the space available, and to establish where and what kind of construction we need. And we've come to the point in that particular matter that we haven't reached any conclusions as far as what we would recommend to the board, but we're now going to go to the public and say "These are the things we're looking at. How do you view them? Let's hear it. Do you have any other suggestions?" Because after we're done this process, then we're going to have to sit down, we're going to have to come up with a recommendation which will go to the board. At that point in time, whether it's accepted or rejected or whatever, we don't know. But now is your opportunity to have an input - so the kind of thing I'm talking about affects when and how you go to the public. If you don't subscribe to the kind of thinking and involvement that I'm talking about, then you make your - you decide well, I think this is the best route. We'll move this over here and build on here and that's the best approach - and then we go to the public "Here's our recom-

mendation. What do you think about it?" Well of course if you get enough hue and cry, you may reconsider, but by the same token, by that time the public says "Well hell, you guys have made up your mind already. What's the use of us?" - so nobody comes. It's entirely different.

I: Ok. How are policies made specifically? By that I mean what processes or procedures are involved from beginning to end in the construction of a specific policy?

R: Well, I suppose it seems to me that you start to establish a policy for a given situation when you see that there is a situation or a group going to be introduced into your system that is going to need some direction - and then I think you sort of have to do some research on the pros and cons and numbers - whatever the case may be - and once you've put that material together and sat down - and if it's a group that by this time is already in place or you have those people around, then you involve them in seeing - hearing their viewpoints on what's going to be needed to reach the ultimate in this particular program or situation - and then your committee then comes up with a recommendation to the board and it's either adopted or rejected by the board - and of course, in order to be policy it has to be adopted by the board. If it's policy that you're adding to I suppose, I think it sort of has to be kind of the same process that you look at what you've got and you look at the

situation that you think may need to have some direction, and do the same thing from there - look at past experience - look at what you can see as far as future experiences or numbers or whatever the thing may be and talk with the people who are involved.

I: Ultimately you're making judgements then.

R: I suppose - yes - I suppose you're making judgements. I suppose you ultimately have to because no matter how - yeah... I would agree.

I: What things or kinds of things that you can think of offhand that influence how policy is made? Is there anything that sticks out in your mind as being particularly determining in how policy is made?

R: Yeah - I think there are probably quite a number of things that influence policy and I guess the policies you may like to make and the policies that you may be able to afford sort of like might be two different things - so I guess there's a restricting factor there - you know - do you have the money to be able to implement the kind of policies that you would like - and I'm sure that there is a number of times that you are restricted by that - the other thing of course is - which I think is a sort of major item lots of times is time - and - ok, so this week for example Monday, Tuesday, Wednesday evenings I spent in the board



office - Thursday evening I spent at home but I was involved with a school matter Thursday - Friday afternoon I'm coming in here to attend a seminar that is involved with board work and again tomorrow - I've got stacks of paper at home - you know - paper seems to be very fluent in a school system it seems to me and some of it that I've put there with the idea that I'm gonna - gee, I'm gonna read that you know - I've never got it read yet - so, I think time is probably maybe at times more restrictive than it should be, but it just seems that you never quite get around to all the things that maybe you would like to - so yeah, I think that's probably quite an effect on some of the policy that you do draw.

I: Do you sense that you don't spend enough time on it or that you haven't got the time to spend on developing it or what?

R: Well, I think in the sense that you - some of both - you either don't have enough time at the time that you are developing it and often there's a situation where - you know - it seems that you've for whatever reason - you need the policy yesterday instead of tomorrow - you know. The other thing is that - yeah, I'm sure there are times that you just don't spend enough time and so - although I think that we generally make policy that - probably pretty reasonable and pretty affective and in the long run really not that bad. I sometimes feel that we maybe could make

maybe even better if we were - more time and that was available to us to study it so...

I: Ok. How do you know when a policy needs to be made or revised?

R: Well, I suppose if you become aware of a situation that - in your system - isn't accomplishing what you think that it should be accomplishing towards your ultimate goal and - then I suppose then you have to look at making policy that helps to redirect that and - oh I suppose - the extreme I suppose is that where you have a situation where you have almost a crisis on your hands and you can see that it's screaming for policy direction, then you better get off your fanny and make some decisions that's gonna put the situation where it should be sort of.

I: Ok. These conclusions that you have and these views that you have about the policymaking process - how it's done - who's involved - all of that - how do you arrive at these conclusions?

R: Well that's kind of a toughie that one - I think quite a bit - in fact a lot through experience - a lot in being involved with professionals probably - like teachers - ex-teachers - people that have worked for teacher organizations - involvement with just people quite a bit - I think that has a pretty strong effect on how you come to

determine what direction you think a particular group or groups should be going - and - ok, I think that one of the - there are quite often times I think that - myself personally maybe feel maybe inadequate a bit to some degree because of - sort of lack of education in the sense of holding up a certificate or something like that eh? - but you know - I think that - then again you think and - stop and think that the experience that you've had in - over your lifetime and the people you've involved in and the things that you see and the results that you see of them - makes you maybe not so much less qualified than some of those people either so - I guess that's where you sort of develop the thoughts on policy and how things should be done.

I: I wonder maybe if you could outline for me in your own mind what things characterize a good policy? Are there certain attributes or elements of a good policy and what would they be?

R: Well, good policy will be specific to the point that it will give direction to the matter that you want it to give direction to - will be general enough that it allows people with imagination and the ability to expand on a particular subject or matter, the room to do that - probably give direction as to the span of time in which you want it accomplished if possible - as to maybe to some degree as to the excellence that you want accomplished at the end so.

I: Maybe another way of viewing it is to think about the characteristics of a poor policy. What would constitute poor policy?

R: Well, little or no direction I think. Very narrow - no room for those people with abilities to enlarge on it for you - no room for them to function - no specification as to how long you want this thing to last or if you want it to go indefinitely or those kinds of things - it's a very narrow kind of a thing I think. To me that's poor policy.

I: Ok. How have you arrived at these conclusions about what's good and what's poor policy?

R: Well, I suppose it's - there again, I think it's sort of a matter of seeing what I would consider poor policy in action and seeing or believing what a difference I think that could be made by having good policy in action. I think what I call poor policy - where you are being so narrow and allowing nobody room to move - that you're restricting it so badly that you might as well not have the thing in the first place sort of thing - whereas if you have good policy that sets out the main parameters that you want - and then hire the right kind of people to work within those and to use their abilities to make that thing work, then it seems to me that's when you're going to get the best out of it, and that's when you're going to have the results of good policy.

I: Ok. Can you think of any examples of a good policy as opposed to a bad policy?

R: I'm trying to think of specific ones - not really, I can't at the moment.

I: Ok, that's fine - Your view of what constitutes good policy or what constitutes bad policy - does that have any effect on how you approach policymaking?

R: Oh yeah, I think so - I tend to want to make sure we cover or attempt to cover all aspects of what we're making policy for - and if our policy covers those aspects - rather than sort of think of a thing and say "Well, ok, we'll make a policy for that" because sure as heck, if you do that, you forgot five things that should have been dealt with in that particular instance and then - so then you put out policy like that and you have immediate reaction either from teachers or parents or whatever the case - one of the groups within your system because you didn't try to look at all the angles that that policy was going to affect - so sure, I think it does.

I: So I gather from what you're saying that one of the elements of a good policy is comprehensive coverage of an issue.

R: Uh huh - yes - very much.

I: How do you evaluate a policy? How do you know if it's a good policy or a bad policy?

R: I suppose the way that I tend to evaluate a policy is to try and make contact with - particularly with the people it affects the most - that are most directly involved with policy that we may make - as well as anybody that the policy may affect - and, if you talk about it with these people and say "How is this working? Is it alright?" - and if it's working reasonably good they'll say "Yeah well, you know, this is not quite the way I'd like to see it and this isn't, but by and large the thought behind it and the general direction and what's sort of intended by the policy is good." To me that indicates that it's basically good policy - but when you don't even have to go to consult these groups to hear what they think about it - then that's bad policy.

I: Ok. I wonder, have you had any particular experiences as a trustee that have really had an effect on your view of what policy is and what policymaking is all about?

R: Well I suppose - like I've had quite a few experiences since becoming a trustee - particularly in the situation that XXXXXXXXXXXX has been going through - and particularly since I'm a trustee that comes from the area that is rebelling - if you like - I guess the biggest thing

that I see and it's I suppose sort of translated into policy - and that is the lack of willingness or realizing that you must consider all groups before you make policy - and that's one that - I think that's a very important factor - particularly in the situation that we've been in.

I: And of course your experience has born this out?

R: Yeah. Absolutely.

I: Ok. This research that I'm doing is concerned with how trustees think about policy and policymaking. It's my feeling that the way a trustee thinks about policy and policymaking could be influential in determining the kinds of policy statements that are finally drawn up by the board. How do you feel about that?

R: I think you're right. I think that's true because if you - in my opinion at least - if you are open and believe that you serve the public that elected you then the policy that will result is policy that is open and considers the factions involved and allows them to have input. If you feel that you are a person that is elected yes, but once elected are there to further your own ideas and not those of the people that you represent, and that it is your job to do it as quickly and with the least interference if you like, or participation by others as possible -

then it seems to me that all you're going to get is narrow and restrictive and undesirable policy.

I: Alright. Given that, do you think that the research that I'm doing is worthwhile?

R: Well, I guess I'll be able to assess that better after I see what the end result is I suppose but...

I: Well, do you have a suspicion - do you think that it might be worthwhile?

R: Well, I suppose in - sort of as I see trusteeship in Manitoba at the present time that - you know - if the research that you're doing sort of thing - if you come out with "This is what I've found after surveying a number of trustees in Manitoba, and this is the general consensus or -you know - this is the way it appears to be being done" - maybe that may cause some people to look at the job their doing as a trustee and reassess the position or stance that they've been taking and as a result - may help to make better trustees of us. And I suppose if it accomplishes that, then yeah, it's worthwhile.

I: Well, what I've been after tonight is trying to really gain some insight into your views on policy and policymaking - do you feel that the questions that you've answered have been appropriate to allow me to gain some of that vision?



R: Yeah, I think that the - you know - the answers that it caused me to give I would hope would allow you to see how I'm functioning as a trustee and how I view my job as a trustee. Yeah, I would hope so.

I: Is there anything that you'd like to add which you feel is important to the study and which you feel I haven't covered?

R: Certainly not that I can think of at the moment.

I: That's fair enough. In that case I'd like to thank you very much for your participation. I really appreciate it.

R: You're very welcome.

TRANSCRIPT # 14

I: In you own words, I wonder if you could tell me, when you talk about school divisions, what is policy?

R: Policy is a form of - a guideline for the trustees to follow - or no - we make the policy and it's a guideline for the principals and staff to follow.

I: Ok what do you mean by a guideline?

R: Well, it gives directions to the administrators to follow and then in turn, they pass it down to the administrators of the school. If you have a policy, then it's easier to follow - everybody would be going off in different directions if we didn't have policy - this way it keeps everybody on track.

I: Ok. When you talk about a guideline - are you talking about it as a guideline 'per se', or is it more directive than that? I'm wondering - is there some latitude in this whole thing - you say it's a guideline for the administration - how loosely can they interpret it - how loosely can they adhere to it?

R: Well, how can I'm trying to think - you've got me on that - when I talk about guideline what I mean is that we all have to have some - a route along which we run a division - ok - if we didn't have a policy manual therefore, we wouldn't be able to administrate schools in the proper manner. The principals wouldn't know which direction to go in certain issues and this way it gives them direction and it helps us if we are confronted by the public on different issues - then we can go to the policy and say well, this is the way it's set up and this is the way we have to follow it - unless, something - a real issue comes up and we feel that the policy does not - is maybe a little bit too strict or whatever - and then we look at it and we change it if there's a need for it.

I: But until that happens, it's rather directive then?

R: Yeah. Uh huh.

I: Ok. Can you give me an example of a policy?

R: Well, a policy is a means and ways of directions to the way that we have to adhere to it. And, I feel that it's important that we do have it.

I: Is there a difference between policy and goals or objectives of the division?

R: Yeah, there is a difference. Goals and objectives in the division are - our goal in XXXXXXXXXXXX is to have a good quality of education - we haven't got a policy - I mean we've got policy built around that but we haven't got a policy saying that we have to - you know ...

I: But there is a link then?

R: Oh definitely - there is a link yeah.

I: Would you say that policies try to approximate goals?

R: Uh huh - yes I would.

I: How have you come to hold your view about what policy is?

R: I don't follow you on that one.

I: How have you arrived at these conclusions about what policy is? Is this something you've always had? Has it changed over time? Has your viewpoint developed?

R: Has policy changed?

I: Your viewpoint about policy.

R: My viewpoint of policy changed? - Yes. Yes. I would say so. Not the overall policy but I know that some of the policies that we have in our manual - we have changed

because we just didn't feel that they were - wording had to be changed or - in some cases we changed quite a bit of the policy - say in bussing and schools review - we did a lot of changes in that. When we first got on the board, we went through our first sch... - we had to make quite a few changes there.

I: Ok. You - I'm wondering if the way you think about policy - when I asked you what it is - you had an idea about what it was - that way of visualizing policy - has that changed at all?

R: No, no - it hasn't changed.

I: Well, that viewpoint that you hold - does that affect the way that you approach policymaking?

R: Yes, I would say so.

I: In what way?

R: Well, it helps me - it helps me to know have - like if something comes up, I know that I can go to the policy and I know that I'm on track. If I didn't have the policy then I would be floundering all over the place. But, I'm glad I have the policy to look at and if - if I can't get the answers out of the policy, then I'll go and see the administrator and get some direction from him - and then he'll look at it and if he sees that maybe it just isn't

fitting, we'll go back to the committee or to the board office and have it sent back to the education committee or whatever - finance and facilities - and look at it. And if there are some changes that have to be made then we will come up with a recommendation for it.

I: Ok. You mentioned earlier that - a couple of times now - that you're glad that you have it - that you think that policy is necessary - is that correct?

R: Yes, I think it's necessary.

I: Ok. Can you be specific about why it's necessary? Why do you have to have policy?

R: Well, we're dealing with so many things in the school division - like we're dealing from - is that what you want me to say, or am I saying the wrong thing?

I: No - just how do you feel about it?

R: We're dealing in so many areas - we're dealing with the upkeep of schools - we're dealing with the bussing of schools - we're dealing with curriculum - we're dealing with children with learning disabilities - all the way up to the student that excels in education and we have to look at these things and we have to make sure that - and my feeling is we - I feel I want to cover all these things in a proper way so that we're dealing with them all equally and to the benefit of the student - taxpayer - and the whole division.

I: And policy helps you do that?

R: And policy does help me do that - yes.

I: Ok. Can you give me a specific example showing me the necessity of policy - you say it's necessary - ok, can you give me an example to show me that it's necessary?

R: Ok - can I give you an example?

I: Sure.

R: Schools review - can I use that as an example?

I: Whatever you like.

R: Ok. When I first got on the school board, we had to deal with a review - a schools' review - and I think there was a lot of animosity in that one - so what we did - we went back and looked at the policy and we made a few changes like - during that schools' review, it had to be an open vote - like everybody had to show their hand ok - now, when you have the public sitting out there and you're voting on something such as a big issue like that - on whether to close the school or to keep it open and you've got residents there - you've got parents that sit on that committee - and then you've got your superintendent and of course a trustee and of course people can pick out and say "Oh, you closed my school." Like you live within the catchment area of that

school and "You closed my school because I saw you put your hand up." So, we went back and looked at that policy and we said "Ok, what we should do is just have it as a closed vote - ballot." And we went through our second review and that worked fine - you just come out with numbers against or for, and nobody really could pinpoint and say "Oh Mrs. Jones - you voted one way or the other." We also made some changes in - that was one of them - changes in the - I'm trying to think now - number of - no we had the number of people - like we had a principal, teacher, two residents and two parents sit on that committee for that one school - say if there was five schools - six schools - that's how many people would sit on that one particular school - and then for each and every other one. The other changes we made were - I'm trying to think - there's a couple more - oh yeah - public coming in for committee meetings - we just closed off the public and then we set up where we would have three public meetings through the entire review. In one case one school closed a year later and the second review - they closed it - it was a decision of the committee to close it that June - so it didn't take that year - now our minister of education has - we sent our policy to her and I think she's following most of the guidelines of our policy - I shouldn't say that but it's true. Anyways, she has put it down - it has to be a year and a half after or whatever - so, we have made a lot of changes there and we're going



through another review, and probably maybe some changes will come up again - you know - like that's where you get feedback from the public - you know - and if we feel there's a need then we'll just go back to it and look at it again, and if it warrants changing - we'll do so. Is that what you wanted? Does that answer your question?

I: Yeah, that's fine - I want whatever you feel is appropriate. You've said that policy is necessary, and I wonder - have you always felt this way or has that developed over time or...?

R: When I got on the school board, I was presented with a policy and said "Here, this is like a bible." I went through it - I looked through it and I thought ok, now this is this - this is for - it's all areas - I don't know what I'd do if I didn't have it. I'd be on the phone all the time - I really would - because you get people calling you up and saying "I would like this for bussing. What is your policy?" I get my policy manual out and I say "Well ok, fine - this is what it says." And I read it off to them and they say "Well, how come I've got a student here..." - like we just had this at our last board meeting - a letter come from a parent whose daughter has to walk toBBBBBBBBBB School - we closed one of the schools and we moved all the junior high into XXXXXXXXXXXX from two junior highs - and we're using that facility because we get over-

crowded in the XXXXXXXXXXXX one because the kids all have that program - and her mother sent a letter to the board on Tuesday - last Tuesday - requesting that her daughter be able to take the bus. Well, we haven't got a bus going that way where she can pick it up so what we did - we gave the child bus tickets so that she can take the bus - and the reason for that was that this child had her hands frost-bitten and I certainly wouldn't want to have that happen again - I mean I know I've frozen my feet and any time it gets cold I feel it again so - we make exceptions to the policy but not all the time - sometimes we get - we can get hung up on it where you give to one and you get somebody else coming in and saying "Well, you know, we've got a breakthrough here, I can try it and maybe I can get through and get the same service." So, it's kind of touch and go - you know - if you go against policy you really have to think it out and make sure that you're not going to get any people coming back and requesting the same because one person got it.

I: You worry about precedent?

R: Yeah, right.

I: Ok. You talked about the policy manual a couple of times - should policies then be written down?

R: You mean written down on paper?

I: Yeah.

R: Oh yes.

I: Always?

R: Yes - not verbally.

I: Are there any occasions perhaps when policies exist that aren't written down?

R: In our case in XXXXXXXXXXXX?

I: Uh huh.

R: No, I can't see it - no. It's always been written down.

I: Ok. Why are all your policies written down? Is there an advantage to having them written down?

R: Well, it makes it easier if they start trying to figure out - if they start making policies off the top of your head and then you have to go back a year or two years back and say "Was it or wasn't it?" You've got to rely on somebody who's got a good memory to say "Yes it was - we did that or we didn't do that." So yes, I think it's important that it's written down.

I: If it's written down, is there any special way it should be organized?

R: What do you mean by organized?

I: Well, you've mentioned a manual - should it be in a manual or should it perhaps be in minutes or should a manual be organized categorically?

R: Oh yeah it is - yeah - yeah.

I: And you feel that's how it should be?

R: Oh yeah - I can go to the index at the back and find whatever I need in there.

I: Ok. Tell me - who makes school division policy?

R: We do - the trustees.

I: Strictly the trustees?

R: No, we get some guidance from our administration on policy - wording and so on.

I: Ok, so there's some input there.

R: Oh yeah, definitely.

I: Is there any input from other groups or individuals?

R: Such as parent groups - are you speaking of?

I: Sure - anybody.

R: Oh yeah - we will - if we get something that comes up by an individual or by individuals - then I think we as trustees - it should be looked at - then we go back and then we have a look at that policy and go over it with a fine tooth comb and say "Ok, where's the changes have to be made?" And, if it warrants it as I said before, then we will make that change to accomodate.

I: Do you solicit - do you actively solicit input into policy formation?

R: I don't know - that's hard to answer - no I don't think we do - no.

I: Ok. If there is input by groups like the administrators or parent groups or whatever, how much input should these people have?

R: How much input should they have?

I: Uh huh.

R: Well, they probably know better how the policy works than what we do because that particular section of the parents - say parent-council or whatever - they probably give us more input and we can - you know - because they're working with it - and as I say we sort of go through it and find out what they want and it if it's satisfactory - to both sides - then we'll make that adjustment.

I: But you don't limit the amount of input then?

R: No, no.

I: Ok. What's the role of the individual trustee in policymaking then?

R: Well everybody - take the policy on bussing - everybody has their own views on it - say even as French Immersion - the parent pays half, we pay half. We had one school - CCCCCCCCCC School - which was our first French Immersion school - and then it got to the point where it was either going to push out the English track - so we had to find another school - and most of the kids were coming from the west end part of - like this area here - and I'm sure you saw it in the paper and I'm sure you read about it and the whole bit - and - so we went looking at schools that were coming down in enrollment - and there are a few in XXXXXXXXXXXX - we're really getting hit bad in this particular area here - because there's no expansion because we've got the river and whatever - we've got all those things against us. So anyways, we approached the one school - and of course they were against it. We went back and we said "Ok. We're not..." They accused us of not letting them have input into this decision so we went back and looked at it and said "Ok. These schools are low in enrollment and could hold the French Immersion. Let's go and have a public meeting." - which we did. So that's one of the routes we

took - like when you were saying public input - we got sort of pressed against the wall and said "Hey, hold it now. You just don't come up in the minutes of your next board meeting and say that we're going to put French Immersion - we're recommending that French Immersion go into this school." Hold on - some of them think that they own the school - like we all own the school - we all pay for it. Anyways, so we got sort of - we got smartened up to be honest with you on that - now we have to have public input into things such as this because it affects the children, it affects the parents, and it affects the whole catchment area. So anyways, we went in and it was such a big hullabaloo that we said "Ok, fine - we'll back off." Then we went looking elsewhere and it turned up that we were able to house it in one of the other schools and it worked fine. After that they couldn't accuse us of not letting them have input because we gave them all the details on enrollment and the whole bit and staffing and let them - you know - we had questions from the public and it worked fine. So, we're really going more that route - we're going more out to the public and meeting them and saying "Well, what do you think?"

I: So your role as a trustee in policymaking then is to bring information out in the open and to gather information?

R: Yeah -we're doing that - yeah - like I say, we found out the hard way. But these things you're not aware of when you become a trustee - you find out as you go along.

I: Alright - has your view about who makes policy - and the way that you've described it, it's the board that makes policy but it solicits input - does that have an affect on how you approach policymaking yourself?

R: Oh yes, I would say so - yes.

I: In what way?

R: We've got another issue that's coming up - it really hasn't got anything to do with policy - I can't even put it in that category - it hasn't anything to do with policy, but it's something - it's a move that we're going to be doing in this division, and it's going to affect children - ok - I personally - and other trustees want to know exactly what the outcome of this is going to be - what it's going to - if it's going to be a good move or a bad move - but really it hasn't got anything to do with policy - but I asked that a survey be done amongst these people - the parents - to have - to give input as to whether they think this program should be continued or discontinued - and that's what's being done right now - so I am sort of leaning to the public for input if that's - yeah, that's how I respond - I just felt that I couldn't go to the board and vote on it without having that information.



I: So in other words, your view of how policy is made or should be made now affects your going out to the community and making sure that this happens.

R: Yeah, yeah - uh huh.

I: Ok. How are policies made? By that I mean - what would be the steps from beginning to end in the formation of a specific policy? Where would it start and where would it end?

R: Ok, policy would start if an issue came up - ok - it would go to the board - ok - and we would look at it and - we'd take it to the board meeting and say "Ok, this has come up and we feel that there's some need for policy to be looked at." Then it would be voted on and referred to say education or finance and facilities or personnel if it's got anything to do with staffing or anything like that. Then, they would look at it - come back to the board - and say "Ok, this is the changes that we've made." And then, if it isn't agreeable to one of the trustees, they would say "I don't like the way that's worded or what." - and it goes back again until it comes out of that committee that everything is just copastatic on it and everybody is in agreement, and then we pass it. That's basically how it goes.

I: Ok, the personnel committee or whatever committee, it sits with the rest of the board and when you

say it goes back to them to look at it, what do you mean by "to look at it"? Surely they've seen it at the board table?

R: It will go - ok, it'll come out in our packets - they'll look at it even before it goes to the board ok - so, like myself, if I'm not happy with the wording, then I will bring it up at the board meeting and say "I think this needs looking at again, and there should be a change here and a change there." And if there isn't a good enough explanation and they feel that yes, that's right, then they go back and they make the changes and then it will come back to the board again. So, in several cases, it's come back a couple of times before it's even been passed.

I: Ok. What kinds of things influence how policy is made?

R: What kinds of things? - bussing of students is one of them ...

I: Not the kinds of things that policies are made about, but what things influence how policies will be made? For instance, I give an obvious example of financial constraints - that would be one thing I'm sure - I don't want to put words into your mouth, but everybody has to follow certain financial guidelines. Are there other kinds of things that affect policy?

R: Well, yeah - those kind of things - well times are changing - every day something changes and - like we've done a lot of policy changing in the two years that I've been on the board - we've done an awful lot of that because - there's a need for a change - ok, that policy might have been sitting like that for three, four years, whatever - and there is something comes up and there is a need that we should look at it and make that change - and we've done a lot of it - we've done a great deal of it - and in facilities and personnel and in - even when you're negotiating with the teachers - you know - they'll come up with a clause and they'll say "This is what we want" and so on, and then you go back and it's in policy - the way we've got it written down but they want that change - then if they get that - then we have to make that change in our policy. So, that comes up too also. And buildings - basically - like with the restraint - policy for energy saving - turning the heat down at night and put it up in the morning and turn the lights off - close off classrooms if they're not being used - that's changing policy.

I: And that's a result of financial considerations?

R: Yeah, uh huh.

I: What about - I'll give you two others - I hate to guide you but I think of things like political pressure -

I think of things like time - shortness of time to act -  
Are these considerations in making policy?

R: Oh yeah - we might have something that comes up and we have to change policy within a week and then that committee will meet.

I: And do you think that that will have an influence on the type of policy that's made?

R: Yeah.

I: Ok. How do you know when a policy needs to be made or needs to be revised?

R: How do I know?

I: Yeah.

R: Public pressure! Mostly public pressure I guess it is when I come to think of it now - I would say that when there's something brewing out there and it just isn't sitting right with - like the French Immersion eh? - you know - like they come to us all the time about this bussing - they're constantly pressing us to take the whole cost of bussing - but with this 6 and 5 that's come out and the country's in such a bad state, they've sort of backed off a bit. But, because - you know - this program warrants it, that - you know - it's a program that's being offered, that they should have free bussing like anybody else - but,

the English track does not get free bussing - they get theirs paid half by the government - like they've got it built in - and we've sort of stuck to our guns on that one and said - no way - like you want to send your child to the French Immersion - that's your choice and so...

I: Are there any other roadsigns that tell you that you are in need of a new policy or that policy has to be revised?

R: Right now?

I: Just generally - policy generally. You mentioned unrest - you mentioned political pressure - I'm interpreting that as being a voice of dissatisfaction from some group - that's one way of knowing - are there any other roadsigns?

R: Oh yeah, I can see one I'd like to see go through - and that's more resource at the elementary level - more not on a one to one basis but - my feeling is that we have children at the lower grades - somehow they're coming out of there - out of elementary and they can't read properly and they can't spell properly and I just would like to see a change in policy where we could offer more help to those students - if that's what you are talking about - I personally would like to see a change in policy - more resource or whatever it takes.

I: So basically what you're saying is that you know that a policy needs to be made or changed when you recognize a problem. Is that accurate?

R: Yeah - uh huh. That's one area that I would really like to see changed. Hopefully we'll get it.

I: How have you arrived at all of these conclusions about policymaking and the policymaking process - how it should be made - when it should be made - how have you arrived at all of this?

R: How do I arrive it?

I: How have you arrived at your view of it?

R: My view on it is I think policy is good - I think we need it - I think, like I said, I personally would like to see a change in one area - I don't know if it'll come about or if it'll ever come about. And changes in policy in this day and age? - we're doing a lot of it - and I think it's necessary - I think we have to meet the needs of the people - we have to meet the needs of the children - we have to meet the needs of the parents - we have to meet the needs of the staff and we also have to meet the needs of the taxpayer right now. And trying to keep good programming in our schools without putting too much tax burden on the taxpayer - it warrants a lot of changes I guess - and one is like this closing of schools is the only way we could see

saving money for the taxpayer - when you've got 150 children in one school that holds 300 and then you've got another school that holds 400 and some and they've got 200, it doesn't make sense to keep both schools open - like energy costs - gas - everything is going up - and people are in a pinch and people are losing their jobs nowadays - there are people that are having a hard time even surviving. As I say, yeah, there's a lot of changes but, basically, that's the one I zero in on and that's giving more help to the students at the elementary level. We've got a good education system - we've got a good program but, somehow, most kids coming out of junior high and high school - we miss something - they've missed something - and I think it's up to us to rectify that in some way or another - I don't know what the answer is.

I: Ok. Can you tell me what are the elements or what are the characteristics or what kinds of things characterize a good policy? You know a policy is good if it is \_\_\_\_\_?

R: I guess a good policy is - my feeling on that question is - if it sits good with everybody - yeah, with everybody - not just the board members or the administration but for the ones that that particular policy is made for.

I: The people that it affects?

R: Right. And not always in some cases - you know - in policy that you can lean more to the right because in doing so, you might be affecting the other side. So you really have to - in some cases you have to sort of order yourself in the middle - but hopefully - and there are policies - here, as I say - French Immersion - they are dissatisfied with this and dissatisfied with that and - we try to accomodate them the best way we can - we have the other end of the stick we have to look after...

I: So in other words, the best policy is one that...

R: Pleases everybody.

I: But the reality is that it's very hard to reach that.

R: Yeah - yeah.

I: Ok. Anything else that characterizes a good policy? Is it possible, for instance, to have a policy that is acceptable to everybody but yet still, for some reason, is not a good policy?

R: Offhand I can't think of any but I'm trying to. One of them that...

I: Well, let's approach it from a different way - what characterizes a bad policy?



R: When there's dissention and unhappy people - when you've got a bad policy - and when you've got a bad policy, you're going to get a lot of bad feelings out there for it.

I: What kinds of things would give rise to this dissention?

R: Well, we had to change policy on tape recorders, cameras, that type of stuff - we had to go back and look at policy because we were getting harassed to the point where everybody - at the time of our schools' review - came into the board office with tape recorders and cameras and was standing on chairs and flashing cameras and taking pictures all over the place - so we looked at it and said "Hey, just a minute Mike. We can't have this going on all the time. Everybody's taping." Mind you, we were doing our own taping too so that we could pick up on what everybody said. And when you're dealing with an issue in front of the public and you know you're being taped, you're inclined to hold back - whereas if those things are removed, then you are more free to speak about the way you really feel about something. So, we went and we changed that. Now that policy, I thought was good - where the public were really uptight about it and said "Hey, just a minute - we have the right to do this - we have the right to do that." But anyways, that cooled down. But that was one - they weren't

happy about it but we felt as a board to operate effectively, we had to take that out.

I: Ok. Your conclusions about what constitutes a good policy - what constitutes a bad policy - how have you reached these conclusions?

R: How did I reach them?

I: Yeah.

R: By being involved in a situation where the policy has warranted - like I say - dissention from the public - I guess basically from the public.

I: So through experience then?

R: Yeah - through experience.

I: Ok. Can you give me an example of a good policy as opposed to a bad policy?

R: Boy oh boy - a good policy I think - in my own mind - will meet the needs of a division. A bad policy will go against the needs of a division - but a good policy can be bordering in between - you know - the middle mark and still be a good policy. There'll be people that'll say "You know, that's not a good policy." But - as I say - you have to draw the line somewhere - you really do and hope to God that it works out. But then, like I maybe six months down

the line something will come up that it can be looked at again and a change made if it warrants it.

I: The way you think of policy in terms of what's good and what's bad, does that affect how you personally approach policymaking?

R: Uh huh. I have to be comfortable with it.

I: And you set out purposely then to develop policy that will be acceptable?

R: Uh huh. We all do - yeah.

I: Do you find that compromising at times?

R: Oh yeah - very much.

I: But that's alright?

R: Yeah.

I: How do you know when to quit compromising?  
How do you know when you can't compromise any more?

R: Hmmm - when I can't compromise any more - when I personally don't feel comfortable with it, then I know that - when I'm not comfortable with a policy - I will state that I don't like certain parts of it and - probably because it's - I personally have been involved in an incident or whatever and it just doesn't sit right with me - and

normally we are all pretty well in the same - on the same wavelength - like one trustee - I mean I'm not involved in things that other trustees aren't - we're all pretty well one big group and we all have the same feelings and we work very well together - we see each other's needs as to policy and we do compromise.

I: When it gets to be that you can't personally live with it, then you feel that it's probably not a good policy?

R: Yeah.

I: Ok. How do you evaluate policy? You have these ideas about what's good and what's bad - how do you evaluate your policy to tell whether it's good or it's bad before it goes out and causes an obvious kafuffle?

R: Evaluate it - ok, we go in and we look at it - we get all the pros and cons - why that policy was made up that way - and we study that - why can't this certain change be made? - and get all the information on that and why we think it should be changed - the merit that will come out of it - and our administration will give us mostly all the information on why it was made up - the reason for it - where he thinks probably the changes can be made and why they can't be made and then we sort of just spend a good half hour on it or maybe more - it all depends on how big the issue is and, we come out with a decision.

I: Have you had any particular experiences as a trustee which have shaped your views about policy and policymaking?

R: Schools' review - I was the one that went in and changed that policy on the voting. I just felt that it wasn't right to have a show of hands in public and then have to go back into your neighborhood and have your neighbors say "Oh yeah, we hold it against you for closing the school." Actually I sat in as a viewer on that schools' review - I wasn't part of the committee and I could see what was happening and so I was one of them - I was the one that went back to the board to have them change it - and also to having the public into the working committees - I just felt that the committees couldn't work effectively because they had - not a lot of people but a few people there throwing questions at them and throwing them off track and it was just delaying the whole process. I also requested that we look at it.

I: This research that I'm doing is concerned with how trustees think about policy and policymaking - not specific policies - but that term policy and policymaking generally - I have a suspicion that the way people think about policy and policymaking could have an impact on the kinds of policies that eventually arise out of the board. I wonder what your reaction is to that?

R: We have a committee - rules and procedures committee - that go through the policy manual - ok - they examine the policy - and if they see somewhere in there that a policy relates to an issue that is happening out there in the public or an issue that is coming up, they will look at it - but they are always studying the policy - that's their job as a committee - to go through it page by page by page - and they look at it and they say "Ok, we've got to look at this one because it really does not lean to this day." It might have been effective five years back or whatever, and they will come back to the board and say "Well look, looking at policy such and such, we feel that it warrants some change." So, they give us the policy - so they're always studying it so really I guess we sort of rely on them too. They like - if I have a particular feeling about a certain policy then I'll say to them "Ok, kind of look at that one." and they'll say "Yeah" and they'll go back and look at it. But, they really sort of - they kind of guide us on this committee and like I say, they're constantly looking at policy - so it really takes some of the onus off of us unless a particular situation arises and then we know that we have to look at it.

I: I wonder - do you think that you as a trustee and the way that you think about policy and policymaking - not specific policies - just the idea of policy generally - do you think the way you think about policy generally will

have an effect on ultimately the kinds of policy statements that come out of the board?

R: Yes, I do.

I: That's my suspicion and that's what I'm trying to investigate. Do you think that that kind of research is worthwhile - to investigate trustees' mindsets if you like - about policy and policymaking?

R: Yeah - I think it's a good idea.

I: Do you think that it will contribute to our understanding of policy?

R: Uh huh.

I: In what way?

R: Well, maybe - well you're talking about policy - do you think it's important that we have policy - maybe in this day - maybe something else - a replacement for it. I don't know. Like I say, I rely on policy but maybe with this study that you're doing, you might come up with something that's far superior to the policy - I don't know - but for me right now, I think the policy is - I rely on policy.

I: Ok. Well, the questions that I've asked you - do you think that they are suitable for gathering the kind of information that I'm after - which is to essentially gain

some sort of insight into how you think about policy and policymaking?

R: Yeah, I would say so - yeah.

I: Would there be better kinds of questions that I could ask?

R: No, I think the questions were good. I think that probably if I'd had more time to really zero in on them I probably could have given you a better hour on them, because I could have probably gone back and maybe thought of a lot of things - sort of in the back of my mind - but off the top of my head - you know - like if this had been done in the first year on the board, I probably would have had that set year and related more back to it because the policy to me as a trustee was a new thing - ok - but now, it's become a part of me as a trustee - if that answers the question.

I: Sure. Well, is there anything that you'd like to add that you feel might be important to this study and which I haven't covered?

R: Well - every division has a policy - I know that in some cases we have our policy - ok - we'll go back to bussing - then we have another division that has their policy on bussing - we might be charging for bussing - the other division won't be charging for bussing, they'll be



giving it free - that causes a lot of animosity out there. They feel that we're taking advantage of them when the other board can afford to give it to them for nothing - this kind of stuff - sometimes in my mind I wish to God we all followed the same kind of pattern but we don't - every division makes up their own policies and being linked together as we are - it can get a little bit touchy at times. So, maybe if we had a policy that would cover the whole area of DDDDDDDDDD - urban and suburban - urban and the country schools and that - then probably we would maybe have less problems. I don't know - I really don't - It's hard to say but it's kind of hard when you're battling against one division to the other.

I: Ok. Well, I want to thank you for the time that you have spent. I appreciate it.

R: I don't know if I've been that helpful to you.

I: No, that's fine - I appreciate it.

TRANSCRIPT # 15

I: The first question then - in your view what is policy?

R: Well, policy I suppose is the guidelines of the board - we set policy - whether it has to do with bus riding or buildings or how the custodians are to handle their job or - right to I suppose the teachers and principals and superintendent and - in my view the board sets the policy and the staff working for the division are to carry out that policy - so I suppose it's a way of setting direction.

I: Ok. When you say guideline - how much flexibility do you allow then if it's just a guideline?

R: Well, again I guess, there are probably several types of policy that would - an example would be say a direct policy of unloading buses. We have a policy in our division of wherever possible - and this is just an example - buses will unload - not unload kids on our major highways such as # X here - by having kids cross the road. And we have a bus doing this right now that comes down 5 miles, drops the kids all off on the right hand side of the road

going north - turns around - comes back and drops kids off going back south on the right hand side - so kids will not cut across the road say during slippery periods, fog periods, early morning periods - that sort of thing. So we try to stay away from the major highways - wherever possible. Those kids then at night have to remain on the bus an extra five minutes. So that is a policy that we set down and a direct policy and it's adhered to - there's no ands, ifs or buts. Other policy - say in general philosophy or policy having to do with education - it's sometimes a little fuzzy - ok - the general guidelines are laid down - this is maybe something that we're striving for in the next two or three years kind of thing and - I think - as far as our administration goes - if they deliberately mislead or are not following the policy, then we speak to them and say "Why is this not being done?". And I suppose if they waver too far from board policy or - for instance in the superintendent's department - if they don't really agree with us, then we also have an alternative of grading them on their evaluation and - of course if the evaluation goes down low enough, then there's always the possibility of replacing them with someone that will follow our guidelines closer. So I think there's direct policies and kind of fuzzy areas.

I: Alright - we'll probably get back to that question too later - is there a relationship between policies and goals and objectives - is policy different from goals and objectives or is it related in any way?

R: Oh I think it's related - certainly - another example is - we are now - part of our goals and objectives say for the next coming couple of years is to beef up our Core French program and - you know - to that extent we are looking at a policy that will help us do that - beefing up the Core French - another idea is on career development - we're doing something on that now to beef it up and with guidance counsellors - with programs in the high schools to give the career development a better punch - now in that particular one it will become part of the guidelines and possibly become part of the policy in our policy handbook stating that it's our intention in the next few years to - for instance have guidance counsellors in every high school. Also, we're looking at other career development plans that are happening throughout the United States - maybe get some ideas from them - so that's sort of the - some of the things that we talked about at the education committee and they indeed end up in the policy handbook somewhere down the road - but that's some of the direction we're taking.

I: Ok. It seems to me then, that policy for you is a tool for accomplishing or achieving specified goals and objectives that you have set out for yourselves?

R: Yes, I think so.

I: Ok. Well, I've asked you what policy is and you have elaborated quite well on that and I wonder - how have you come to hold this particular viewpoint?

R: Well, we have a policy handbook that we go through in - well, throughout the year we make changes in policy, but we now have established a procedure where we're going to be going through the policy handbook every summer during the summer holidays - updating it, changing it, and again, some of the perhaps guidelines or moves that we make within the division may indeed happen and then enter the policy handbook later. That's a possibility if the updating process - or in other specific instances like the bus thing - that's right in there under the section of bus drivers, and the routes that we want kids dropped of is there. Another thing we did with buses last year was - all our buses drive with their lights on. That's just a cut and dried thing that's entered into the policy handbook under bus drivers, and they all know it and these are the rules - so, I suppose sometimes they're rules - sometimes they're perhaps entered after the fact.

I: Ok - since first becoming a trustee, has your notion about what policy is changed at all?

R: I guess not really. I sort of see the board as the board of governors and certainly most policies or directions that the division's taking is in consultation with the superintendent's department. We try to work as a team. However, there are occasions when the board of trustees strongly agree with something and perhaps the superin-

tendent doesn't, and it still goes into policy and usually gets done.

I: Your view of what policy is - does that affect how you approach policymaking?

R: Well, possibly - I think my view is shared with a majority of the trustees that we are elected representatives of each small ward, but in turn work for the entire division - for the betterment of education and trying to spend the almighty dollar the best way. But, I would think that most trustees in our division share my view on policy - I believe that we set the overall guidelines and direction along with the superintendent. He attends our education policy meetings - and also the assistant superintendent and the secretary-treasurer and anybody else that we would like there - so, when we're hashing out - for instance - a change in policy - we bring that back to the whole body of trustees and usually debate it very well - and it's usually not done without a lot of thought - so I suppose my original concept of how we make policy and carrying it out and that sort of thing is shared by the majority of trustees.

I: Ok. Well, tell me - do you think that policy is necessary in a school division?

R: Oh I think so.

I: Why?

R: Well, I think that if we didn't have things written down, and if we didn't make policies to handle situations or have a policy for different situations, then I think we would be a little disorganized and I think you have to treat everybody equally throughout the division so I would see it as - if you didn't have any guidelines or any policy I could see it as being run off the cuff and that would be probably very disorganized - the division would probably be - for example, each bus driver would be doing his own thing - so perhaps a car - just take this highway out front here - going down number X maybe - would not have to stop for one bus because he's off the side of the road with no lights blinking or stop sign out - and the next bus down the road he's got his blinking stop sign out - kids walk across the road and get hit etc. - so I think we have to - I think part of policy is to standardize procedures, goals, aims, that sort of thing - in what we're doing - trying to be equal in each school.

I: Ok. Has your opinion changed about the necessity of policy over time?

R: Well, if anything, I suppose my first year as a trustee I didn't think that the policy handbook was too important, but I suppose now after three and a half years, I've changed my opinion - especially being chairman of the

policy committee - we maybe don't make a lot of changes but some of the changes that we do make and vote upon and put back into the - or add to the handbook are probably necessary - and I suppose yes, my opinion has changed from the role of the trustee not getting directly involved in some of the decision making in the schools etc. to making a policy and trying to see that it's carried out kind of thing. I think that's where the trustees sit - as the board of governors - as the policymakers and the watchdog kind of thing - make sure things are run properly.

I: Ok. The fact that you feel that policy is necessary - does that have any bearing on how you approach policymaking?

R: Probably - I - along with the making of policy of course is the passing of motions and I believe that in order to get things done, and in order to make sure that there's a follow up, that a motion should be written and voted upon and then if passed - that becomes law. And, of course, some of them motions that do go through are then entered into our policy book so - you know - there are some meetings that when we discuss things and we say "Ok, this is the route that we're going to take." - for example right now we're looking at changing our students that take courses outside the division - tightening that up. In the past we've had students go outside the division and take courses



that could be offered within the division and that sort of thing - so we're tightening that up - that's going to enter into the policy handbook and it's going to be cut and dried - it's been debated - it'll be coming up next meeting - I think a lot of times the best way to approach things is through the motion system - through the trustees voting on it - then if it's passed that's the guideline there - and like I say, some of that enters into policy so... If anything, my - just getting back to your question - my opinion now is that - rather than leave things to chance or say we're going to do this - or would you do that - I like to see it in a motion.

I: So you go after it?

R: Yeah.

I: Ok. Well, having motions and creating policies and guidelines and all those kinds of things - should these be written down?

R: Most definitely! The - again all our motions are handwritten by the mover and signed by the seconder and they're handed in to the chairman and he in turn reads them out and we vote upon them - from there it goes to the secretary-treasurer - signed by the chairman and entered into the - wherever - ok - we get the proceedings back from each meeting - the motions that are passed etc. - but, by

all means, I think motions, policy; all these kinds of things have to be written down because two or three years down the road trustees change - they don't know what's happened in the past - what was the criteria or that sort of thing - so if they're written down there will be written record - we can go back and say "Ok, this motion was passed in such and such a year and why are we not doing it today?"

I: Would you advocate organizing this written record in any particular way?

R: Well, yeah - I think the system that we've got works fairly well. We have a policy handbook so if we were to pass a motion or debate - for instance bus drivers - that would go under the bus drivers' section of our policy handbook - addition to - or if we change anything - delete - that sort of thing - so - and we also have a written - type-written copy of every meeting - what was discussed - what motions were passed - the motions are numbered etc., so - most definitely I think that the record keeping system that we've got is pretty adequate - perhaps could be improved but...

I: I wonder if there's any occasion when policies exist without being written?

R: Probably - yeah - there's probably the common-sense policy or the unwritten policy that - this is what

went on in the past kind of thing - so by past precedent we did this in the division and we're continuing to do it.

I: Do you see any advantages to this or disadvantages to...

R: Well, probably disadvantages - I strongly believe that things should be spelled out - things should be written down and records should be kept track - but there are some areas I suppose that are grey areas or very touchy areas - ok - and for that reason policy in the past has never been written down and - you know - I suppose - should be I think. I don't think that there are any areas in education that we shouldn't be able to deal with but, there are some areas that - trustees in the past and still today feel a little uncomfortable with so we sort of just go along - this is what we did in the past - past precedent says we'll do it this way...

I: So the advantage is not having to commit yourselves to ...

R: I suppose - yes - the grey area where you can - if it's down in writing then there's no area to manoeuvre.

I: There's accountability then.

R: Yes.

I: Ok. Who makes school division policy?

R: Well, the policy is made by the - I suppose in the end run by the board of trustees through motions and voted upon - so the majority if it - we have nine trustees on our board, so if it goes in five to four, it then becomes law or policy of the board until such time as people maybe decide to change it - so at the next meeting it could also be wiped out by a five to four - if people can - or trustees can campaign but, originally, with our division, we look at changes in policy originally at the committee level - or if a trustee or the superintendent or somebody in our staff has an idea we'll discuss - for instance and educational matters will be discussed in the education meeting by - we have four trustees on that - and the administration staff - and then brought to the trustees with an explanation of why we would want to change a certain policy - a good example is - for the last three years we've been very hard on overnight camping trips with our students. We - the board at the time has felt that overnight camping trips are not necessary and what we've said is that - perhaps they're necessary, but they will not take two school days - so if they want to go on an overnight trip they have to go on a Friday and use a Saturday etc. which the teachers don't like. The board has stayed with that policy for the last three years and this year, we finally got it changed after some more discussion etc. We happened to think that overnight trips can be a very valuable learning experience - so we have finally

changed that now - you know - again it has to be reviewed by the superintendent's department and then the trustees etc. but, that's just an example - of we do change policy and ...

I: But you're talking about input from the superintendent's department, then I gather that what you're saying is that the teachers' group have some input - you said teachers didn't like it - I don't know if they had input but certainly you heard their voice - so that it seems to me that the making of policy is a joint venture with a number of people - at least there's a number of people involved in it. Is that accurate?

R: That's certainly accurate in that particular case, and I suppose in many other cases - we do have - we do call the principals in from time to time from some of the schools if there's a particular policy that's going to affect them - or they can come to us any time as a delegation to school board meetings - and we've had that happen - another example is that we changed the policy last year on the booking of school gyms, classrooms etc. to the hands of the principals. Prior policy of the board was that the bookings would be done through our office and we changed that to make it more efficient and perhaps more available to the public where they go to the school and fill out the form - the principal signs it and it's carried out through each individual school. We had a bit of flak from some of the

principals who didn't want to take this burden on and we had a delegation come to the school board about this - by a couple of principals and we listened to them - explained that we wanted to streamline this particular booking procedure and that we understood that there would be a little more work but that they could delegate some of that work to their secretaries and this was board policy and we were going to try it for a year. A year and a half later, we're still into that particular style of booking and we think it's working very well. So, not always do the principals agree with the changes etc. - sometimes they try to fight it but again, the board is the boss kind of thing - so if we set down policy and sometimes it's in agreement with the principals, sometimes it's not. Again, with the principals they have monthly meetings with the superintendent - so some of the feedback of course that comes into policy is a team effort with the principal initiating some changes - talking it over with the other principals along with the superintendent - and perhaps the superintendent selling it to the school division - the board.

I: Ok. I just wondered - with all this input coming in, is there any limit to the input that individuals should have in policymaking? Is that wide open?

R: Well, we don't have very many delegations or direct input from the principals - that's through the super-

intendent - I would say that there's probably no limit - we like to look at all avenues and different ideas, but I think that there's also a fine line where we're not about to let the principals do their own thing - they do run their own ship to a certain extent but, under the guidelines. You know, we can't have everybody running around doing their own thing - you know - in whatever area - whether it's discipline or standard of education or that sort of thing - I think we try to operate as a division.

I: What's the role of the individual trustee then in policymaking?

R: Well, out of a nine member board, all trustees are equal and each has one vote - the individual trustee can I suppose, depending on their area of interest, expertise etc., certainly initiate changes - lobby if he can - if he's a strong enough lobbyist or if he has a good enough idea of say on changing policy - and he can get five votes - then that could become law so, I suppose a disadvantage on some boards or an advantage is that - on every board you probably have one or two pretty powerful trustees that maybe have been there for a while or maybe are sharper than the other people - education wise - debating wise - and they in turn can sway or can determine a lot of direction. I don't think that's necessarily bad as long as they're doing it for the betterment of division and betterment of education - that's

probably fine . I suppose if anything in the boards across the province that I have seen, that there are probably too many weak trustees too many trustees that are not really with it - that don't have kids left in school - they've been a trustee for 21 years and probably are going to be a trustee for another 21 years - and they're still thinking back in the fifties and sixties - they're not thinking 1980/1990 and where we are today. So, if anything, I'd say generally across the province we are - the trustee system is probably not working to its most efficient level and that has to do of course with the - getting right back to the election system where people just either don't care or don't want to run.

I: Has your view of who makes policy - has that changed over time? Has it developed or altered?

R: Yeah - I guess as you learn the system - in my first year it seemed very much to me like the superintendent was the godfather of the division and whatever he said the trustees just gave him the green stamp - or the majority of them. However, after a year or so - this particular superintendent got the green stamp - or he got relieved of his duties through age, ideas, etc. - there was enough trustees could see the light - so now we have a new superintendent and I guess my first year was very very frustrating. I felt I had a lot of good ideas, however, none of them got past



first base. Now I feel that - I in particular and a few other trustees have a lot more input and we work as a team as much as possible - so we do get along - our superintendent does have some ideas - but again, he's not God or the godfather - he doesn't have all the answers and together we hopefully are making some progress - I think in the last year - year and a half - we have certainly made some progress in trying to better the education system in the entire division.

I: The viewpoint that you hold about who makes policy - does that affect how you approach policymaking personally?

R: Yes - after three and a half years of being a trustee I have learned to play the game quite well. I know how to talk to people, debate, line up support, lobby - which is very important. In my first year I just used to attack and I turned everybody off and consequently a lot of my motions I had problems getting seconders for - or if I got a seconder, they went down 7-2. Now, on discussing policy I find that we have to debate it very well at the committee level - we have to have - usually have the majority of the committee with us - not always the 100%, but - usually try to have the majority of the committee with us if we want to put it towards the rest of the trustees - we may do a little lobbying to see if we can get it into the

policy handbook so - yes, my personal opinion about policy-making and how to get things done or how to get things changed has changed in the last three and a half years - certainly.

I: How are policies made? By that I mean - can you describe to me what happens from the very first step to the very last step in the making of policy? How does it come about? What are the procedures, processes that are gone through?

R: Well, I guess depending on whether it's a brand new policy or a change in an old policy to sort of the off the cuff kind of thing - perhaps something happens in the division and then we don't have a policy to cover that so we maybe let that happen and handle it the best way we can, but then we instigate a policy to cover it in the future. The procedure usually having to do with whatever area - if it has to do with buses for instance - it would go to the committee on transportation. If it had to do with buildings, it would go to the committee on buildings. And, the same with education, the same with finance - they would make recommendations to the board and we do have an education teacher liaison policy committee. So, I think first it would go through the proper committee for deliberation and then back to the board and maybe back to a committee again depending on the changes or seriousness or whatever. So, I

see making policy - if we were to make a brand new policy on an item - I see it as probably coming up as an idea - whoever instigates it - superintendent, principal, trustee or whoever - saying that we do need a policy for this - an example would be let's say bus loading procedures at the school - we do have a set policy - and that has come about through the years by probably - really instigated when a child got run over at one of our schools and killed a few years ago. The bus loading procedure then was sort of haphazard - the kid came running out under the front of the bus to try and get around to the door - the bus driver couldn't see the kid for the hood on the bus and ran over the kid and killed him. So from then, of course I suppose the trustees at that time quickly said "Our policy on loading buses is pretty shabby, we'd better get it cleaned up in a hurry." And, perhaps by looking at what other school divisions do or by getting help from the province or whatever, our bus driving procedure right now is pretty tight. The principal's out there - there's teachers out there - the buses line up in certain way and they can't move until they get the signal - so that's just an example.

I: What kinds of things - you've outlined how policies are made - the processes - the procedures that are gone through - what kind of things would influence those processes?

R: Well, I suppose one of the important things in our division - and I can just give you a good example from last year was a French Immersion program that was going to come into the division and we had a committee for French Immersion who lobbied quite hard - who attended school meetings as delegations etc. - and they did want the program to go into one particular area in the division. We deliberated that - talked to people in the community - talked to principals - talked to the French Bureau - we had our own public meeting - and we decided as a board - not everyone in agreement - but we did put through a motion that we would offer French Immersion at another school - a school where we had room etc. Then we had a delegation from that particular area come with signatures on a petition to lobby that they didn't want it in their area because they were afraid the English kids would be bussed out. So, we had a lot of fun there and we ended up - it actually died a natural death - it may come up again this year, but the final result was that the people that were signing their kids up for French Immersion weren't that serious about it because they didn't want them bussed eight miles down the road to another school - they wanted them right at home. So, I suppose, depending on the nature of the event or policy or whatever, there's a lot of things that can influence it. Again, if it's - you know - it could mean say how strongly the superintendent feels about something - if he feels very very strongly that

we should do something and he can perhaps persuade some trustees to put the thing through - maybe enough trustees - five out of nine - again it could depend a lot on the lobbying of some trustees - if a trustee feels very strongly about something perhaps he can lobby enough to draw support for that particular motion and - once a motion goes through, whether or not it's in the policy handbook, it's still law - the way I see it - until such a time as it's turned around or defeated.

I: How do you know when a policy needs to be made or when an existing policy needs to be revised?

R: I guess the policy needs to be made part - we look at probably different situations - a lot of times I guess it happens as it comes up - for instance we don't - a certain situation comes up within the division and someone will immediately ask what our policy is on that. We look it up and we don't have a policy on that - let's make one. So, I suppose, as situations come up or as people in the division - trustees, principals, superintendent, whatever - perhaps as they're reviewing the policy handbook we notice different areas that are not covered and perhaps we should have a policy on this - that kind of thing. As far as the changing goes, I guess again, as something comes up and we do have a policy on it but it's not adequate or it should be changed - I gave you an example a little earlier about over-

night trips - the policy around the division for the last three years - and we voted on it every year to try and change it - it always got defeated - leave it the way it is - those kids are not going anywhere on two consecutive school days - now they can - so after some work, and the superintendent happened to feel very strongly about overnight trips as being soundly educational etc. whereas the other superintendent didn't really - so there's just one example of change in policy - another example I gave before was about the buses - wherever possible we have our buses on major highways drop children off on the right hand side of the road - and if that means keeping kids on for an extra five to ten minutes for better safety, then we do it - so that particular one was changed and there's lot of other examples.

I: Ok. Well, all these ideas that you have about the policymaking process - how it's done and how it comes about - have these ideas changed over time?

R: I would probably say developed over - I've only been a trustee for three and a half years - but I've quickly learned - maybe not so quickly - but after the first year I had a rude awakening that some of my ideas were probably very good ideas, but without any kind of support or any kind of lobbying for them, they just didn't get anywhere - they were just voted down - a lot of times just for the sake

that "Here's that young smart whippersnapper coming in with another one of his brainwaves and we're going to defeat him." I'm sure there was a little of that done - but - so yes, my - in the three and a half years I have changed my tactics let's say and I think that in our particular division also - the making of policy and direction has changed and the major change there would be the change of the superintendent who is the chief executive officer and I think - when I worked one year with the old superintendent under - and he had seven or eight years in the division - under his particular regime, he was relied on very heavily by the trustees - the trustees in my opinion didn't do very much thinking or policymaking - he came in with it - he's the one that did the lobbying with the trustees to see if he had enough support and if some of the trustees were against it, he'd back off - he was a very good political strategist and knew how to stick handle. So, under his - and also I think under his regime there was more of a Hitler type approach where - you know - we got to do it this way blah blah blah - and most of the time he had his own way. So really I think in my first year as a trustee and he was in for about seven or eight years - there was probably no need for a school board - you could have let the superintendent run it because he most of the time or 98% of the time got his own way anyway - or would instigate ways of getting his own way. Today it's an entirely different story and I think the -

probably in any division that the superintendent is probably the key personnel in policymaking - policy changes - that sort of thing.

I: What are the attributes of a good policy? What are the elements of a good policy? What elements characterize a good policy?

R: Elements that characterize a good policy - qualities of a good policy would probably be a policy that is well thought out - a policy that is clear and specific in guidelines as this is how we want it done - so it's spelled out very clear and specific - with a lot of thought behind it and in the long run, policy that is going to benefit the educational system - whether it be in safety or whatever areas but - I don't think that we should just have a policy for something because we don't have a policy for it kind of thing - I think it can be debated, well thought out, so everybody can understand it - perhaps some background to it and perhaps some foresight saying that if we do this kind of policy - if we follow this policy - the end result down the road is going to be a better whatever - so I suppose to the betterment of the education system.

I: Alright. What about the converse? What would constitute a bad policy?



R: Well, I guess just the opposite of what I said. A bad policy would be one that is not very well thought out - one that people jump into without any thought - perhaps they're pressured and we need a policy to cover this immediately and so we whip into it - one that has no background preceding it - and one that has no outlook to the future. So, it would be just the opposite of the first one I guess.

I: Ok. How have you arrived at these conclusions about what makes a good policy - what makes a bad policy?

R: I guess through experience. I've seen some of each and I think that rather than making hasty decisions or hasty policy a board should - and I think there's also bad policy or bad decisions made near the end of meetings as opposed to the beginning of meetings - people get very tired - we have day meetings and some evenings but mostly day meetings and people get very tired later on in the afternoon - or for instance pressure - constant pressure from some trustees or the superintendent until finally they wear down the opposition and they say "Well, I'm getting sick of this thing - let's vote on it and let's get rid of it." So, hasty decisions - I think trustees are better to than make a hasty decision - are better to table the motion to a farther meeting for more discussion - again some policies are made through ignorance and lack of information - by just

believing what one principal or the superintendent or one trustee is saying about a certain area - well they do it this way in another division so we should do it this way - but in reality 64 divisions in the province do it another way - so, without checking into background etc. so - and I've seen this where trustees do make some bad policy.

I: Alright. Does your view of the attributes of good policy and the attributes of bad policy - does that in any way affect how you approach policymaking?

R: Oh certainly - yeah - most certainly. I try to approach it with first of all getting as much knowledge about the subject as possible. And, if that takes two weeks or a month or whatever then that's fine and I put many motions on the floor to get more knowledge about a certain area - so I think going into making policy - with your eyes wide open - what is happening around the rest of the province or the rest of Canada etc. - being well informed and certainly trying to - with the overall guideline of not just making policy for the sake of making policy but to enhance - improve - that sort of thing - try to improve whatever area you are dealing with.

I: Ok. Well, when you are making up a policy or debating policy or gathering information - when you finally come up with a policy and before you implement it - how do you evaluate whether or not it's a good policy?

R: Well, we could - I suppose if it's a - I think there are kind of easy commonsense motherhood types of policies where you can't go wrong - and then there are other ones that are maybe medium and some very sticky ones. I suppose the very sticky ones again, you want to debate very well, you want to have accurate information and hopefully make the right decision - you can also of course cover your butt by having a trial period - which we did in the case of the school gyms - we had a trial period of one year - we happened to like the way it's going on - there are some principals that still hate us for doing that - however, we're sticking to our guns - we happen to think that this is the best way to handle the situation - the public is happy with it and more accessible to the gyms in the schools etc. so we're continuing with that. So I suppose there's a bit of a trial and error kind of thing in there - I see nothing wrong with trying out a policy within a division - and if it doesn't work I also see nothing wrong with changing it or reversing it or erasing it. You know, I think you have to be constantly ready for change and evaluation.

I: Ok. As a trustee have you had any particular experiences which have shaped your view or your views about policy and policymaking?

R: Well yes - every meeting is an experience and you - again I think that the calibre of trustee throughout

the province - and I'm just speaking generally - but it happens on our board also - is certainly an indicator of the type of division you have - the type of policy you have and that sort of thing - so there's certainly a - I think room for improvement in the calibre of trustee I think - just to be an interested parent is nice but it would also be nice to be an interested parent and a professional. I think that's one of the key problems with the trustee system in the province is that we don't attract enough good people - we attract perhaps enough concerned people, but the election process - the pay is very low - the people just don't want to be bothered - and we could certainly use more lawyers, accountants, professional people as trustees - I think that's probably one thing that we're really lacking in this division and many other divisions - is attracting good people to run and therefore - if you've got good people perhaps you can make good decisions or better decisions and just to add to that problem is that you are always dealing with professionals when you are dealing with superintendents, principals and teachers and the Manitoba Teachers' Society, the association of school superintendents etc. always have the upper hand or mostly have the upper hand on trustees so therefore they can indirectly or whatever - manhandle the trustees in many cases - and many times the trustees don't even know they're being manhandled.

I: Well, this research is concerned with how trustees think about policy and policymaking. It's my suspicion that the views that trustees hold about policy and policymaking might have some kind of an influence on the types of policy statements that eventually emanate from a board. How do you respond to that idea?

R: I suppose that that is true. I think that there are many trustees that seldom or ever look at the policy handbook or think "Oh hell, that's another policy - big deal." I think that's true on our board - in some of the trustees - there's not a lot of - I see policy and written policies as a professional approach versus a common-sense kind of amateurish approach - "Well, we'll handle that problem when it comes up J\_\_\_\_\_." Don't worry about it - right - we're not going to spend a lot of time on this kind of thing because it may never happen - that sort of thing - however, I see a good policy handbook and things written down in policy as a professional approach - as we do have this - we do have a policy on this and it is covered and it's well thought out and these are your guidelines principals, teachers and superintendents. So I think again, we get back to the amateur type of deal with it when it comes up or after the fact to the professional type of approach where you're going to deal with it before it comes up.

I: And you would say that that then would reflect in the kinds of policies that come out of that board?

R: Certainly - oh certainly.

I: Ok. Well, I wonder - do you think this kind of research is worthwhile? This research that tries to find out what trustees think about policy and policymaking?

R: Yes - I would have to say it's worthwhile - I would be interested to know the results of your particular project - I don't know who would get a copy of it - Maybe MAST or somebody could get a copy so that it would get back to us - but I think certainly it's something to look at because the whole direction of education within a division - where we're placing emphasis - that sort of thing - has very much to do with the guidelines and the policies of the division and I suppose trustees are - one of their main jobs is to set down guidelines and policy saying that this is the way we want to go within this division - otherwise, there's probably really no need for trustees - the local autonomy kind of thing is very big in most areas of the province and there's a reason for that I guess - it's a - you know - it's been handed down throughout the years - this is the way we run things - we want to elect somebody right for our area so we have local input into what's happening.

I: So you think that this kind of research will yield some kind of better understanding of that whole process of policymaking?

R: I hope so. I'm not sure how - I think you're doing something right across the province so you should get a very good idea of a provincial kind of understanding about what policy is about and some of the questions you've asked in your question period here about - what do you think about making policy? - who makes policy? - that sort of thing I think you should probably get a fairly good understanding...

I: That was my next question. Do you think that the questions that I've asked you are appropriate for trying to get an insight into say your particular view of what policy is and...

R: Oh yeah - I think so - You've - it seems to me like you've covered the field pretty well and again, you're only getting my opinion versus somebody else in AAAAAAAAAA or whatever but I think you'll find a fair amount of similarity between - you know - some of my answers and somebody else over in the other end of the province. Perhaps, if anything there would be some trustees that don't think policy is that important or never open their policy handbook or never follow policy. Like I say, I think that's an amateur type of approach or perhaps an approach that trustees really don't know why they're trustees.

I: Ok. Is there anything that you'd like to add which you feel is important to this study and which I haven't covered?

R: Well, no - I think you're dealing with - I'm not sure of the title of your paper but you seem to be dealing specifically with policy - how is policy initiated - how is it - how do you get the idea about what you want to do with policy - how you carry it out - that sort of thing so it seems to me that you're dealing specifically with the making - running etc. of policy which is in my opinion probably the most important job of a school trustee - is to establishing policy - perhaps also establishing long range plans and goals which many of us - many divisions I suppose have problems with - especially with this day of recession - how do you establish a long range policy or goal for your division when money is in such short supply these days and - you know - we are in a recession and cutting back and that sort of thing so that's a problem too. It's fine to set goals and policy, but if you can't carry them out - you know - you have to be a little careful there. No, I think your questions cover - I can see very well what you're trying to get at and you're covering it from different angles and some of the answers are of course going to be repetitive.

I: As were some of the questions.

R: Right.



I: Ok. Well thank you very much for your time.

R: Ok - good.

TRANSCRIPT # 16

I: Ok - the first question then - In your own mind, what's policy?

R: Policy - those are the things that are written down that direct our administration in which overall direction we want things to go - written directions - they're not specific in nature - we may have a policy that outlines that we want all children in our division to have a general education - that doesn't preclude our administration from pointing somebody in a vocational direction - but, as an overall policy we want to see all kids come out with pretty good academics as opposed to straight vocational.

I: Ok - so these are guidelines?

R: Guidelines - yeah.

I: And I gather from what you said that there is a fair degree of latitude in the interpretation of those guidelines.

R: Uh - yeah - I'd say there is.

I: Can you give me an example of a policy statement then?

R: Ok - we just recently have been working on a policy regarding program development for gifted students. The policy guidelines state that within the next two years we want a program set up within the division for the gifted. The policy statement separates gifted from bright - from average - from slow learner. The policy statement in general sets out areas such as academic enrichment as opposed to pushing the kid through at a faster pace - those types of things - policy.

I: Ok - is there any connection or distinction between policies and goals and objectives?

R: Yeah - we've just gotten into goal setting - long term planning. We haven't had any specific written down long term plan. We're going to be getting together with our administrative people along with a facilitator to sit down and sort out exactly what direction we want the school division to go in. We want to set up - like a five year plan with a means of evaluation etc. - and that way the policy can be adjusted where it has to be to suit the long term goals.

I: Ok - you've given me an example of - within two years you want a gifted program in the division. Would you say that that's policy?

R: That is a policy and a goal. One of the things that came up when we started working on this program for the gifted was that we took a look and said "Well, we know we're going in this direction for the gifted - do we really know what direction we're going in in all the other programming areas?" Things like are we really happy that there's no examinations? Or is this just something that just happened because nobody ever thought about it? So, our policy is maybe running off in different directions - that's why we wanted to set an overall goal.

I: Ok - and you say you're going to adjust your policy - is it correct...

R: We may have to adjust our policy and then again maybe we won't. This long term goal setting will have a review of policy sort of innate in the process.

I: So what you're saying is that policy though should centre on goals - is this accurate?

R: Uh huh.

I: Well, why do you hold this particular viewpoint of what policy is?

R: Part of it I guess is my experience as a trustee. When I first came on to the board - out of the seven trustees, there were two or three who sort of thought

they should have a hand in running - say the curriculum - the board should set curriculum as opposed to the administration - making recommendations on the curriculum or making decisions on the curriculum - and as a trustee, I really didn't feel qualified personally to make decisions on the curriculum - and if you have a policy that generally states "Decisions on curriculum will be made by the administration - reviewed by the board to see if they fit into their overall policy" - it seems to me a much better way to run things. As a school trustee, I don't want to be involved in the day to day administration of the school. I would like to see an overall policy that all people in the division are aware of and adhere to. But, I don't want to get into making a decision for this school and a decision for that school so - the policy has to be there as far as I'm concerned. But, it was part of experience in dealing with other trustees who had no idea that - their job - well my whole job as a trustee as far as I'm concerned is to set a policy and set guidelines - it's not to get in there and do the administration - I don't want to get into a classroom and teach.

I: You say it was part of your experience - did you bring with you some notions that policy was more general than the specific meddling into administration that you talk about?

R: Yeah - from my own experience in administration - I like to know what \*\*\*\*\*'s policy is - then I can make decisions that further that policy. I don't want my boss in AAAAAAAAAA coming down and meddling in every decision that I make in my office.

I: Ok. Does your view of the nature of policy affect the way you personally approach policymaking?

R: Yeah it does. I like to have input from the people that policy is going to affect. You can't make a policy blindly - you have to have some input from the people who are expected to enforce this policy. If you set out a particular policy and it's completely unworkable - there's no sense setting policy. I'm not saying that I always agree with the input but, I like to open a dialogue.

I: So you pursue that...

R: Actively!

I: Ok. Do you think that policy is necessary in a school division?

R: Oh - very definitely. I think your overall policy affects the whole tone of your school division. It affects who you hire - who makes your administrative decisions - the kind of administration you're going to have. It affects to some degree the people who run as a trustee. We

mentioned earlier a small division where I really don't think they have any overall policy - or if they do - people aren't aware of what it is - people are running around in all different directions.

I: So you see policy as a binding kind of thing?

R: Yeah - it gives you a focal point.

I: Ok. Can you give me an example of where a policy is necessary?

R: I'll say in your various collective agreements that you have. There's usually a number of clauses in there saying "Such and such a leave shall be granted or may be granted." We'll take the mays first. We have a policy that states all leaves shall be applied for - first of all you apply to your principal on a specified form. The principal passes these on to the superintendent. The superintendent comes to the board with these with his recommendation and that's our policy - those particular leaves will be granted or not granted. It's very rarely that we don't follow our superintendent's recommendation. I can't think of a time in the last two years that his recommendation hasn't been followed. But, as a board, we decided that the person who knows best whether or not this leave should be granted is the superintendent - so our policy is to have the superintendent be the last word on whether or not a leave will be granted.

I: And that solves problems for you does it?

R: Yeah, it solves a lot of problems.

I: What would happen if you didn't have it?

R: The previous policy - we used to have teachers show up at board meetings and ask for leaves - and the people on the board had no idea whether this leave would be convenient for the particular school or that it would be convenient at that time - and a lot of people on the board weren't all that familiar with the collective agreement and didn't really know whether this person was or was not entitled and it just did not work well.

I: Has your opinion about the necessity of policy changed over time?

R: Not really. I went in with that kind of an idea and I went in because I was aware of some other people already on the board that had some problems with a lack of policy in certain areas.

I: Well, your opinion then about the necessity of policy - does that influence how you personally approach policymaking?

R: I would - I haven't really given it that much thought but I guess it does. Policymakers have to be aware of the reasons why they are making a policy number one -



what is the purpose of this particular policy? - who's it going to affect? - and I try and make other new board members aware of the reason for policy. I guess this would be more of a procedure than a policy but every board meeting you get a checklist of cheques that have been written. We had one trustee who said "Gee, what I want is before every meeting, I want all these cheques broken down, and I want to know exactly what was purchased with each cheque. I want a list of this to make sure that the division is spending its money correctly." So it was pointed out to this person that the policy was that this was the way the checklist was presented at the meeting. If you had a specific question about a specific cheque, certainly you could ask it and at that point the secretary-treasurer would get details. And, it was pointed out to him the reason for this policy - because it was so time consuming and unnecessary because the secretary-treasurer wasn't allowed by law to purchase anything that wasn't a budgeted item to begin with - and once this overall policy is understood, then they're much happier with it.

I: Ok. Should policies be written down?

R: Definitely.

I: Why do you say that?

R: Well, if I as a chairman of a board have a particular policy that's my policy and it's verbal and it's understood by all the people that are there now - that may be well and fine. But if I get run over by a truck tomorrow - my policy may also be run over by that truck and other people may have a different interpretation of that policy and if there's nothing in writing - that policy isn't available for all the people that it affects.

I: So, it should be written down just for continuity's sake?

R: Well, for continuity's sake - for the sake of being easily understood - if there's something in policy that is vague - if it's written down, somebody will ask for a clarification that can be incorporated into your policy.

I: Well, that's the should part. Do policies exist that aren't written down? Can policies exist that aren't written down?

R: Yeah. They can. I can see as a trustee that - two K-9 schools - and there's sort of different policies are there - and they're not written down. There's sort of a different educational philosophy in the two schools because of the difference in the administration.

I: Why would these policies not be written down?

R: Possibly because some of the policies in the two schools are a bit at odds with our overall philosophy and it's something that we have been working at to bring everybody sort of along one track, but it's a very slow process. It's something I find very difficult to put into words. For example, one principal - his policy is you only grant leave to someone if they are there on bended knee and can really demonstrate that this is a need to - not a like to. The other principal - his policy is more ok, if you want it - fine. He doesn't ask any questions at all - and it affects the way people relate to each other in the different schools. But, the overall policy is that you know, your request for leave be put in writing etc. etc. One school sort of enforces this rigidly - the other school says "Oh yeah, put it on a scrap of paper and I'll get it in to somebody."

I: Is there some advantage to not writing down policies in this case?

R: Yeah, people are sort of protecting their hidden agendas.

I: Ok. Who is it that makes school division policy?

R: Well, I can only speak for our division - I have some impressions of some other divisions but nothing I

can speak to. In our division basically, it's gone back and forth over the last five and six - ten years. For a while trustees were really really involved in making policy to the exclusion of the administrative people. And then for a while, the administration took over completely to the exclusion of the trustees and ran their own show. Now I would like to say - and I can say with some degree of certainty - it's a joint effort between the trustees and the administration. We've been working really well as a team making policy.

I: Ok, does it stop there? Is it just the trustees and the administration or are there other people involved?

R: Well, when I say administration, I'm sort of including teaching staff. When we - well we decided to go into computers - decided we'd like to investigate going into computers and the whole staff was involved in that, not just the administration and the trustees, but teaching staff as well had input into that.

I: Ok. So you have teaching staff and the administration - any other groups?

R: The local parents in the community don't seem to have very much involvement in policy. Sometimes I feel like we're acting in a complete vacuum. We never have

anybody show up at school board meetings - never. We have the odd delegation - band parents may come in - or if you mention - word gets around that you're going to do anything with sex education you have the Baptists and those groups - but other than that, we never have any input from the community. It's difficult - even when you actively solicit involvement from the community - to get anyone involved. We haven't had any crisis type situations. I guess that's why.

I: Well, of those groups that you do have involved in the process, or who do take an active part in making policy, to what extent should their input extend?

R: I'm not too sure that I know - like is there a weight...

I: Is there a limit to the amount of input they have? Is there a weighting to their opinions - that kind of thing?

R: From my perspective there is. As a trustee I see myself and my fellow board members as making the final decision. Input - say when we were talking about what kind of a policy we were going to have towards computer education - the input from our staff came from a strictly educational point of view - what they felt they could do educationally with computers. We also had some input from our administration as to what use they could put computers to in running

division affairs. And then, the trustees tried to look at it with an overall picture of the merits of as opposed to the cost of - cost benefit type decision. And, trustees as being representatives from the community, I think their decisions are - carry a little more weight. Somebody has to make the final decision and that's where it is.

I: But at no time though do you impede input?

R: No. We try not to impede input. We'd like to hear from all.

I: Ok. You may have answered this question already but what is the role of the individual trustee in the policymaking process?

R: The role of the individual trustee is to gather as much information as they as an individual can and to give the benefit of their knowledge on any particular part of the policy, and then to act as a group - hopefully to reach consensus. You don't always reach a consensus and at that point we go back to majority rules.

I: Has your view of who makes policy changed over the years?

R: I think I - it has changed only to the point where I have got a little better idea of who has the input into the policy. When I first got onto the board, I'm not

too sure where I thought I was going to get all my information from. When I first got on the board I think I thought I knew a lot more than I did and after a year on the board you realize - gee there's a lot of things that I don't know about and I'm going to have to get some information on it. To that extent it's changed.

I: Ok. Well, your view of who's involved in policymaking - who's actually involved in the process - does that affect how you personally approach policymaking?

R: Not really - other than the fact that maybe I'm a little more ready to listen to people.

I: How exactly are policies made? By that I mean - what processes or procedures are gone through? - what's step one to step the last in the formation of a policy?

R: Well first of all you have to have a reason to have a policy. Usually there's a particular area where decisions have to be made by someone. So then you figure out who should be making this decision and why. You gather your information - cull it and sort it out and prioritize - and at that point you try to get in writing what should be done.

I: When you say prioritize, do I detect an element of evaluation at that point?

R: Yeah. You have to. That sort of goes without saying. Our particular policy manual covers all sorts of subjects from how the custodial staff operates to what our policy is on academic field trips. We never used to have a policy on academic field trips until it started to be one school was going here and one school was going there and budget funds started to be an item. So then in order to be fair to everybody, we did up a policy saying that at the start of the year every school puts in where they want to go that year. The budget is set for X number of dollars for academic field trips. The schools get their share proportionately, depending on the number of students and ages, and then they get their share. If they need to raise additional money that's the individual school's responsibility. But that policy came about because there was a specific problem that wasn't being answered. It was individual classes or schools would come in on an 'ad hoc' basis. There was no planning done.

I: What kinds - I'm going to skip back to a question - you mentioned policy manual - do you feel that's how policy should be organized - you said that it should be written ...

R: Well, I like the idea of a policy manual. Policies affecting different people in the division are grouped in specific parts of the manual. Policy affecting



school closing - policy regarding whether kids are allowed to transfer from one school to another - who makes the decisions as to transferring a child. I mentioned there's a policy regarding how the custodians operate - policies regarding where trustees will travel to - how our administrators will travel - and it's all fairly well organized in specific sections so if anybody in the division - asks a question about the division, generally there's something in the policy manual that addresses that. So, nobody's left wondering.

I: What kinds of things have an influence on how policy is made?

R: There are many things...

I: Ok, what are those with the most impact?

R: How policy is going to affect people! That's one of the things that impacts on policy. Budgetary restrictions impact on policy. Personalities to a certain extent impact on policies.

I: I think I can understand the budgetary ones - but could you detail a little more about the personalities and how that impacts on policy?

R: I think as a board member, if I'm working on formulating a specific policy, I try to keep in mind the

particular personality of our superintendent - what kind of things he's going to be comfortable administering - his management style. The same thing with our custodians - when we looked at that kind of policy we looked at our facilities supervisor - his personality and how it would impact on policy.

I: So you have people, budgets, personalities - anything else?

R: Nothing I can think of off hand. Maybe I'll come back to that.

I: How do you know when a policy needs to be made or needs to be revised?

R: Well, you know when a policy has to be made if you're continuously faced with a particular problem. If eight or nine times during the year you have somebody coming to the board or to your superintendent saying "What do I do in this situation?" - then you know you need some kind of a policy so people aren't like wondering. And you know they need revision sort of in the same way - when people come and question like "Why is this the policy?" We have a periodic review of our policy manual - once a year for sure the policy manual is reviewed completely. We send out a memo to all our division employees saying "Have you taken a look at your policy manual lately? Would you do so in the next

month and then forward any suggestions to the board regarding any revisions that you see as being necessary?"

I: I wonder if you could give me an example of a policy that suddenly you knew it had to be revised or had to be made.

R: Well, our policy on the policy manual. We had a board/principal meeting and it was brought to our attention a couple of years ago that the principals were feeling a little bit left out of the policy. They said every once in a while somebody would send down a new page to them saying that this was now our policy. They came to us and said "Where's our input? When do we get to sit down and talk about policy?" That's where the policy of having a once a year revision that went out in writing and people were invited to come to a policy review meeting. That's how that policy evolved.

I: How have you arrived at these conclusions about the policymaking process - you know you've told me who's involved - you've told me how it's done - how have you arrived at this?

R: Through living with policy I guess. Started off with sort of a bare bones policy manual when I started on the board. I'd been on the board for about a year and I had some questions about some of the policies - and at that

point, some other people had some questions about the policies as well - and at that point we made a concentrated effort to get unwritten policy down on paper in an organized fashion.

I: So essentially you've grown with this policy.

R: Yeah - like I say, we started off with a bare bones structure. And, I guess I work with policies job-wise. I just expected there to be a policy.

I: Ok. Does this viewpoint of how policy is made, does that affect the way you approach policymaking?

R: Yeah. At one point I thought "Well gee, we should have a policy that says whatever. We should have a policy that says we extend the school year by a month." But, that's not reasonable. You have to get input from the people that it affects. You can't just impose something on someone and say "This is the way it shall be for now and forever." People who don't have any input into anything - they're not very willing to live with a policy or enforce that policy.

I: Alright. In your mind, what are the attributes or elements of a good policy - things that characterize a good policy?

R: Number one that the policy directs itself to a specific issue - that the policy is easily understood - it's not vague. People who have to implement the policy have had some input into the making of it.

I: Maybe another way of viewing this is to look at the other side and try to suggest elements that would constitute a bad or a weak policy.

R: Ok. A weak policy is something that the policy is there and no-one really understands it - or knows why is this policy there. Bad policy tends to confuse an issue more than clarify it. Bad policy tries to cover - be all things to all people - policy can't be that. Where there's a hole in your policy there has to be some sort of process that's there to either formulate a new policy or to revise it so that it answers people's needs.

I: I wonder if you could give me an example of good versus bad policy?

R: At one point we had a policy that spelled out very specifically to the last little degree, exactly when a principal could close a school. If the temperature fell below X number of degrees, if there's X number of feet of snow or if the plumbing didn't work or - and the policy tried to be too specific - and there was always an occasion that arose that wasn't specifically written there. Somebody

at one point said "Well, sure the temperature is only twenty below, but with the wind chill factor..." so finally we took a long look at that policy and said - we had an overall policy that said "No, the schools were never going to be closed no matter what the temperature." - or whatever - the school would always be open - and it was up to the individual principal to make arrangements in his school so that if there was eight kids out there who didn't realize that the school was closed and came to school anyway, there would be somebody there to look after those kids. And the principal - the policy said - it was the principal's responsibility to make arrangements. That policy was workable - the other one wasn't.

I: So workability then is a factor in good policy?

R: Yeah.

I: How have you come to these conclusions about what constitutes a good policy and what constitutes a bad policy?

R: By living with some really bad policies, and seeing the results of really bad policies.

I: Which are?

R: They don't work! If you've got a really rotten policy, people spend most of their time and efforts trying to circumvent it rather than trying to make it work.

I: Your view of the attributes of good policy and the characteristics of poor policy - does that have an effect on how you approach policymaking?

R: Yeah, it does. Perhaps I've learned through experience not to make a policy too rigid. There has to be some room for manoeuverability in the policy.

I: That refers back to your notion of a guideline at the beginning...

R: Yeah - I don't mind a rule being bent. Sometimes they have to bend rules to make things work.

I: How do you evaluate a policy now that you've gone through the policymaking process? When you come up with a policy, how do you evaluate whether it's a good policy or a bad policy?

R: Ok, I'll use a specific example - our policy on academic field trips - the first year we formulated the policy at the end of the year we called together those people that it affected - our phys. ed. people and principals and said "Are you happier with things this way than before when you showed up one at a time to ask for funds?"

And the last guy there found out there wasn't any funding there at all. We spent that budget. And they said all in all they liked the policy better but they had some suggestions as to ways that the policy could be improved. A couple of the suggestions were when they were setting out budgets - could we put it into policy that when we set out the budget for a particular trip, that all expenses were to be included and not just the cost of transporting pupils. So, we enlarged the policy a bit to make sure that everybody understood that when you asked for funds, you asked for overall funds, not just for transportation. Policy was in for another year - let's see, it's going into its third year this year - and at the time we sent our memo around saying are there any revisions in policy - that policy was left as it was and it's workable right now. Three years down the road it may not be.

I: So basically, you evaluate policy by seeing how well it works?

R: Yeah.

I: I wonder - is there any evaluative mechanism prior to putting it into place - once you have hammered it out and come up with a policy statement and before you pass it on to your administration ...



R: Generally a policy statement as such doesn't make it into the policy manual until it's had a bit of a trial run.

I: Alright. Have you had any particular experiences as a trustee that have shaped your views about policy and policymaking?

R: Oh yeah. My first year on the board we had a chairman who liked to make decisions all by himself and he found the rest of the board was a real hindrance. He wanted to run the whole show period. He would do things like go to the administration and say "Ok, what I want you to do is this." and things would come back to the board that had been done and the board didn't know anything about it. It started to come back that "The chairman told me to do this and the chairman told me to do that." And he usually did this in areas where there was no clear cut policy. Part of the reason for the policy was to curb trustees from getting in there. We spent a very nasty year at that. The board would make a decision say regarding negotiations saying "This is how negotiations shall be conducted. These are the limits that you have." and instead of working with the negotiating committee, he'd be off making private deals which sometimes worked and sometimes didn't. Nasty experiences!

I: And those essentially engrained in your mind the necessity of policy and good policy?

R: Yeah. Right.

I: Well, this research is concerned with how trustees think about policy and policymaking - not in the concrete sense but somewhat in the abstract - not content specific - and I feel that the way that trustees think about policy and policymaking might be influential in determining the kinds of policy statements that issue from the board. I just wonder what your reaction is to that idea.

R: Yeah - that's very true. The association of school trustees got really involved in the 6 and 5 and individual boards sort of leaped on the band wagon and said "Oh yes - 6 and 5!" and didn't realize how that particular kind of a policy was going to impact on their specific division. It's fine to say that you're going to hold all your budget increase down to 6 %, but, then you have to realize that in order to hold to 6 %, well God, you're going to have to do with four less teachers - or whatever. To me, holding the line to 6 and 5 is damned poor policy. If you're going to enforce it rigidly - as an overall guideline - to say "Yeah, we're going to try and do this." - fine. But it can't be so rigid that you're going to wholesale get out there and chop programs and say "Well this year we won't have phys. ed. - we can't afford it."

I: You're suggesting that people's vision of what policy is has an effect on what comes out...

R: Yeah - for a board to go back and pass a motion that says "Well, our policy this year is that our budget will increase by no more than 6 %." I think that's a very dangerous thing to say and I think perhaps trustees don't understand what they're saying when they do that.

I: Ok. Do you think this kind of research is worthwhile?

R: Yes, I wish before I had gotten on the board I had a better idea of what types of policy that I as a trustee would be expected to have a voice in. Who else had a voice in policymaking? I find a lot of trustees running for the position of school trustee, having no idea of what they're going to do if they get there. I said before, now my idea of a school trustee is someone who makes policy, not someone who administers policy. There's a big difference between making it and administering it. I don't think the average brand new trustee realizes that.

I: Do you see this research as something that could possibly help clarify that?

R: Yeah I think so.

I: The questions that I've asked you have been designed to specifically try and get some kind of an insight into your mental set if you like, about policy and policy-making. Do you think these questions have been appropriate to the task?

R: Yeah. I would say so.

I: Is there anything you'd like to add which I haven't covered and which you think is important to this study?

R: One of the things that I as a trustee would like to know - I'd like to get administrators viewpoints in policymaking and how they view their roles and the trustees' roles.

I: Ok. Well I'd like to thank you for your time and answers.

R: No problem.

TRANSCRIPT # 17

I: Ok, the first question that I have for you - in your own mind, can you tell me what is policy?

R: Policies are, I suppose, the rules that are set for the standards of education and how education is going to be delivered within our own district. Policy is derived from decisions that are made at the board level. It's not carved in stone - it can be changed - boards are flexible.

I: The boards are flexible but I hear you say not the policy itself.

R: Yeah - that's correct. I'm saying that policy, once it's laid down, is there to be obeyed or to be followed but if a policy is incorrect then obviously a board should be flexible enough - if it's proven that the policy is incorrect - they're there to change it.

I: Ok. Can you give me a typical example of a policy statement?

R: Policy statement - the first one that comes to mind is what came in our school district two years ago - a

policy of no smoking. We were told it would be impossible to supervise - it was still brought in by the board. No student was allowed to smoke on the school property - particularly in the carpark actually - the carparks - and it has proved to be somewhat successful. Our own policy lays down after - if you get caught smoking - the first time you get suspended for three days - the second time for five days - I think it's fourteen days for a third offense.

I: I wonder - is policy different from goals, objectives or desires or is there any linkage between policy and goals and objectives etc.?

R: Very tenuous links sometimes between policy and goals - sometimes the policies that you make are - you make because you feel that they are correct for the system, but the goals that you would have in the system would be to keep - possibly - all the students within the system for the maximum amount of time - such as that that I've just related within the school. The goals must be to give the students the best possible education - a very trite thing, but that's the way you would say it. But our policy that we've laid down says that if they smoke, we're going to throw them out for three days - they're going to lose three days education - so there is - although you would hope that your policy always does contribute towards your goal - it's not a very very - not necessarily leading the same way.

I: Alright. Why do you hold this particular view of policy and what it is?

R: From my own experience - I have no other way...

I: You've come to realize this then?

R: Yeah.

I: Your point of view hasn't changed then since first becoming a trustee?

R: Oh my point of view has changed tremendously since becoming a trustee.

I: In what way? How did you view policy beforehand?

R: I suppose I didn't - well after leaving school and a secondary education which is totally different in \*\*\*\*\* to what it is here - I had no real idea at all about what policy was or how you could lay it down, or what effects making certain policies would have. So, when you go into a school as one of the trustees for the first time, you've got certain things on your mind - I'm going to achieve this - I'm going to do that - this is right - this is wrong - it's not until you actually get yourself immersed into the trusteeship that you realize that there is nothing so black and white as you ever thought it was in the first

place - you know, you might say "This is right." until somebody or you actually through experience learn of the ramifications of doing certain things - then you realize you can't always follow black and white.

I: Ok - so in that sense would you say your view of policy and what it is has become more realistic - more reasonable ...

R: Yeah I would.

I: Ok.

R: School boards are - have become a lot more political since I joined the school board. I don't think I was political at all to start with, but now you're sometimes prepared to make trades - in a teacher-board liaison meeting sometimes you're prepared to bend a little bit to get something else - you know - you do this all the time. With the main objective to be - not for personal gain - but to do what is best finally for the school district and not just the school district but the pupils in this district.

I: Would you say that this bargaining impinges into the area of policymaking at times?

R: Sometimes - yeah.

I: Could you think of an example of where it might?



R: Very recently a big item in our school district has become - the board passed a motion - not too many weeks ago that all professional development days would come under the strict control of the superintendent. Our own branch of the MTS and the \*\*\* felt that this was a big slur on them. They feel that they should have control of at least one - two - if not three - they can't quite decide what they need but at least two days - you know. Now, in liaison - we're not a whole board - but as a committee we sort of - we also wanted as a board to get more supervision of our students in the high school in the lunch room. Now I was prepared to offer the carrot of a little bit - that we might be able to get a bit more control back to the \*\*\* if the teachers were prepared themselves to assist the board in giving the control of the lunch room without any promises - you know - that is a typical sort of bargaining that we would do - you know - \*\*\* negotiations are bargaining.

I: So it goes right into policymaking then?

R: Into it - yeah.

I: Your view of the nature of policy - what it is - does that affect the way you personally approach policymaking?

R: I don't think so - no.

I: Do you think policy is necessary?

R: Yeah. Policy has to be laid down because you have to have guidelines for people to work by. There has to be a certain amount of organization in any business or - anything you do, there has to be a certain guideline laid down - without policy there's chaos! But you have to be careful that you're not - that you are amenable to change policy if it's proved - it has to be practical - and what's policy for one year may not always be policy for five years later - it may not be correct - it's a policy yes, but it may not be correct - it may need amending. Policies have to be looked at all the time and as necessary, ammended.

I: Can you give me an example of where a policy has been necessary? When you say you need policy - what would happen if you didn't have policy?

R: Well, this may not be a very good example, but take sabbaticals - there's certain policy laid down as to who may and who may not have sabbaticals. Now, sabbaticals seem to be extremely popular because it gives the teacher a year off to increase their knowledge - studies - or whatever they want to do - but if the policy wasn't laid down as to who would get preference, then again, it would be wide open to certain - you know - at least we say now that sabbaticals will be given to those people who have been with the district the longest - who need them - we still have some who don't have their first degree you know - so those would

be the people who get their sabbaticals first. It's not really a very good example and in fact I - very simple policies are policies laid down that - in XXXXXXXXXXXX, if the wind chill factor gets over - I think it's 2000 - recess will be inside. Now if that policy is not followed by a principal, then as a school board, we can say "Why didn't you follow it? Why didn't you check in with the weather office?" - because the complaints that will come in from the parents - their little Johnny was outside and froze himself silly - you know what it's like - those are not exactly what I would call great examples of policy but they are necessary for the working of a school district. The smooth working - and also to give the confidence of the parents that put their kids in our district. We are responsible for them and you know - that's ...

I: Has your opinion changed with respect to the notions of the necessity of policy that you now hold?

R: I think yeah -yes they have.

I: In what way?

R: Well simply because now I can see both sides of an argument whereas as a parent - with my kids in the district beforehand - I only got to see one side - you might get to see the second side which was the principal or the individual teacher's - but now I'm looking from a much

broader perspective. I not only get to see one principal's views, I get to see six principals' views - so as a parent I would only have seen the teacher's who was in contact with my own children or the principal that was in contact with my own children. Now I see and hear everybody's.

I: Do you feel more strongly about the necessity of policy now than before - when you first started out as a trustee?

R: I would think it's about the same.

I: This belief that you have now about the necessity of policy and how important it is to have policy for the effective running of the division - does that affect how you then approach policymaking at the board level personally?

R: Yeah, I suppose it has to because if you think that a policy has to be fair - you have to in order to make that decision - prove to yourself as best as you can that you're making the correct decision in setting down a certain policy. As trustees, sometimes you have to be - it doesn't matter how much trust you have in your administration - they might give you their views - but I feel that sometimes we have to go out and seek other people's views before we'll say yes, that's correct. So it makes you more - it makes you careful as to how you make your decisions.

I: Ok. Well, you've talked about policy a bit now and you haven't really mentioned this so I may be putting words into your mouth - I don't want to so correct me if I am - but I'm wondering if policies should be written down or not?

R: Oh I think policies should be written.

I: Why?

R: Because I believe that there has to be an orderly way of referring to policy. It has to be in black and white.

I: So you're saying that it would leave too much open to interpretation then?

R: That's correct - yeah.

I: Faults of memory and that kind of weakness?

R: If a policy manual is laid down - a person has to have something to refer to whether it be a teacher, a student, principal, superintendent or trustee!

I: Ok. Talking about policy in the reality sense of the word and maybe somewhat abstractly - does policy exist that isn't written down? Can policy exist even if it is not written down?

R: Yes, it can exist.

I: Can you think of an example?

R: No, I can't think of an example but I suppose in our district we do have very extensive - and if - we have tended to and there other - there was a very large policy manual prior to this board coming to office and - I can't think of too many things where you can say that it's left up to individual interpretation. It might be - actually a policy itself can leave a certain amount of leeway - but I can't think of anything where you can say "Well, this can be done either way." - unless it's something within curriculum or something like that - but actually as far as the board decisions are made, I think we do put it down into policy.

I: Ok. Well, you said that you'd like to see an orderly way of referring to policy - if it's written down - I gather then that you are in favor of a manual or of some form of organization of policies.

R: That's correct.

I: Do you have any particular design or any ideas about how it should be organized?

R: There's a manual that we go by - we have our own district manual - it can get somewhat cumbersome - it seems to be good - I don't know if you want to go into the technicalities of the looseleaf binder or - sections - and the principals also have their own manual - the teachers have their own manual ...

I: Could I assume then that it's one that's divided into sections and parts - is it indexed and cross-referenced etc.?

R: Yeah - that's right - and as policies are changed so are manuals updated - together with the by-laws of the district etc.

I: Ok, and you would be in favor of that kind of organization then?

R: Yes, I do really. I haven't had any experience with a district without that type of thing, but ours works so well - and I use it personally quite a bit - especially as a new trustee and even as - I don't think the first year I used it as much as in the second and - because now I know where to look - you know - the first year as a trustee you're splattered with paper coming from every direction and people trying to give you information in some way - it gets foggy with the other ...

I: Ok. Who makes school division policy?

R: The board makes school division policy. I say that with a certain amount of reservation, because if you're not careful administration can make it and just get it endorsed by the board. That happens to a great extent and I'm not sure that it doesn't happen in our district a little bit.

I: Ok, if you look at making school board policy in a process type of sense, are there other people involved in the process besides the board?

R: Yeah - we have - recommendations normally would come from the superintendent but they - recommendations would come, but the actual start on making that policy or changing that policy could quite easily have come from the grass roots - where they feel that changes in policy or that maybe a different policy - sometimes the policies are made straight from the board. It's been our particular board's habit that at least once a year we meet by ourselves without any administration or anyone else present - and I think quite a bit of policy has come out of those meetings simply because we haven't had the administration there and we've talked it out and gotten something going.

I: Alright - I'm assuming that you look favorably upon this input from various areas - either the administration or the grass roots level or whatever other concerned group might be involved. Is this true?

R: Yeah - it's definitely true.

I: Do you put any caveat or any kind of restriction on the amount of input that these groups or individuals should have into policymaking?



R: Because of time constraints as trustees - I think we have to put a certain amount of - and also because you can get the certain power groups, pressure groups or whatever you like to call them - could try to make big changes - and as a trustee you have to weigh up these different things and see if in your own mind - I have no problems at all with receiving deputations - talking to teachers - talking to everybody that wants to talk to us from - you know - parents and students as well - because I think it's important. But, the other final onus on making policy is on the board - that's what you're there for - that's why you're elected - and you know, you can't dismiss that responsibility by saying that policies can be made by somebody else.

I: Well, if the board - and I view that in the corporate sense - makes the policy, what's the role of the individual trustee in the policymaking process?

R: Well, you can only speak personally - it has to be borne in mind that none of us - not on this particular board are professionals in or have been in the teaching - haven't been in the teaching profession prior to coming on to the board - so bearing that in mind and knowing the restraints or the limitations that we have, then I feel that we have to get as much information from different parties as we can. We all have to be aware of our individual limita-

tions and knowledge and we have to get as much input as we possibly can about the people - we have to weigh it up as well about where that input is coming from and the reasons that they want to give it to you.

I: So essentially your role is a judgemental role and an evaluative role of the information that's coming to you?

R: That's correct, but also you've got to put your own personal philosophy into it, and it does - you know - it sways you.

I: Alright. I wonder if you can give me an example of a policy that's been made by several inputs if you like?

R: Not offhand - it will probably come later!

I: That's alright. Has your view of who makes policy - has that changed from the time that you first began as a trustee?

R: It has to a certain extent although when I stood for election there was a public meeting - which was mainly tended to be attended by teachers and I suppose that was the first idea I ever had that there was a feeling in our district that policy was made by the superintendent's department and not by the trustees. That was the first

warning I had and - I wouldn't say it's changed that much. At that time I was made alert to it. There is a danger that if a trustee doesn't - is not aware of the different people that are trying to put policy in front of you - I wouldn't say it's changed that much - no.

I: Does the viewpoint that you hold about who makes policy - does that affect the way you approach policy-making?

R: No. The policymaking still has to be the one main criteria - the selfish reason that most trustees run - if it can be called selfish - is to try and better the education for the students - mostly - we have children in the system and if you don't like what's going on previously, perhaps you go in thinking you'll do a better job.

I: Alright - how are policies made? By that I mean what are the processes or procedures involved in the formulation of a policy? What are the steps from beginning to end in the derivation of a particular policy statement?

R: Once again, I can only speak for what I know in our district. It can come from several different ways. It could be an individual board member or the board as a whole could be approached from a teacher, by a student, by a parent who feels that something or other should be changed, or something that should be put down - or something should

be regulated. Normally it would go to the board - the board would then go to the superintendent's department or administration - ask them to come back with their recommendations as to what can be done - recently we've been using MAST quite a lot to try and compare ourselves with other districts so that we don't go off on too much of a - and it then comes back to the board and it's placed there for a - a decision is made.

I: From that decision then, the policy statement is issued?

R: Is issued. Normally our superintendent will come with a draft policy and it will then go to the board - amendments will be made and it will come back for a second time and then approved.

I: Alright. So if I can recap this, there's a problem or point of instigation if you like - it may be a problem, it may be a question -

R: It could just be an idea.

I: An idea - alright - that is referred to the board somehow - transmitted to the board maybe through administration - maybe the board members directly -

R: Maybe it's directed to a single board member who would then bring it up.

I: Right - and then the board decides to pursue it further - returns it to the superintendent's department or school principals or to other groups perhaps?

R: Yeah - normally it would go through to - straight to our administration - either the superintendent's department or the secretary-treasurer's department.

I: Ok - they outline a variety of possibilities - it comes back to the board with a recommendation amongst those possibilities?

R: That's correct - yeah.

I: At that point, does the board evaluate all the possibilities or just the recommendations?

R: All the possibilities. I would say that normally we would go on past that in the first place. We would say this is what we want. We want a policy that lays down this, this, and this. Now tell us - is it feasible and then give us the policy as it should be written down. The usual wording etc., that's your job - you word it for us - but come back and tell us of any ramifications or any problems by laying this down - now if it does affect teachers - if it does affect a certain group within the district - it's possible that the board might approach them and say "Well, this is what we're thinking of doing." I think it's very important that we do this. Sometimes we fall down on that

and we lay the policy down and we don't approach them, but that's normally how it's done. Then it comes back to us again - this time - the policy we want is there but we want to just make sure that it's written as we want to say - we have a look at it a second time and then we pass it.

I: So it's a check?

R: That's correct.

I: Ok. What kinds of things influence policy? You mentioned earlier time, you mentioned being a political animal as a trustee - are those two particularly important factors that influence the making of policy and are there others?

R: Well, I wouldn't say that time is so much in the making of policy except as to how a board person goes into the policy. Time is there for the superintendent's department. It's part of their job to find time to do it - to do the research that we require - or the secretary-treasurer's department or whichever part we decide to place it with of the administration. Really and truly - I know we can get awfully technical - but I still lay down that it's whatever the trustees feel is for the school district - best for the school district. That has to be the total and top criteria - and that may not necessarily fall in line with what other trustees in other districts feel is best for

Manitoba. It has to be - especially in ours - that's what affects it most - and that's what controls it most.

I: Ok - so really it's basically the personal perspective of the trustees?

R: That's correct - yeah - as to what they feel is best - this may be a thing certainly somewhat insular because of where we are, but I have enough confidence in myself and in my other trustees - that is the main reason. I can't think of any policy that's been made where you'd say "Ah ah - maybe that would mean for a certain or that really isn't going to..." There have been policies laid down that I've disagreed with - but as a corporate body one sits there - you have to back it.

I: How do you know when a policy needs to be made or needs to be revised? Are there any signposts along the way?

R: I suppose a breach of policy - because a certain policy that's made and then somebody says "Well, this person shouldn't have done that because it's not - policy is made." and you say "Why shouldn't they do it?" and they'll say "Well, it's not in the policy." And policy might have been perfectly good - like I said earlier - five years ago, but things might have changed somewhat - or if a problem is showing up in the schools such as the no smoking policy

etc., - I suppose - yeah - a dozen different ways - it can be brought to your attention. Sometimes you can - an event can happen in a school and you think - well I never gave it a thought beforehand. Another policy - in XXXXXXXXXXXX now at long last we have a half decent television service with a cable service - so we have a channel which is a community channel. It's been brought to our attention that the community channel has now been coming into our schools and filming everything without getting permission from anybody really - just walk in and film. Now one of our trustees who works for the media brought it to our attention that there could be a copyright policy - you know, a copyright problem that's being breached - and so, policy was laid down and - or is in fact in the making - and again we went back to our superintendent's department and said "Let's go and see what other districts are doing. What's AAAAAAAAAA and BBBBBBBBBB and CCCCCCCCCC doing where they have community channels? How do they get over this problem?" We didn't want to make them put a policy in that would stop by any means the community channel coming in - we just wanted to protect ourselves. Policy sometimes has to be - I suppose like in that case - just has to be brought up to date because things are changing all the time.

I: And so when things aren't working smoothly, that's when you start looking at policy?

R: That's - that's correct.



I: How have you arrived at all of these conclusions about the policymaking process - how it's made and who is involved in it and how it takes place?

R: Simply by personally - learning experience. That's the only way.

I: Alright. And the viewpoint that you hold now about policymaking - does that affect how you approach policymaking personally?

R: Yeah.

I: In what sense?

R: Well, the sense is the fact is that one has to understand that in making a policy it's very easy for somebody to sit up in a high chair and say "This will be policy" - and unless they understand the full effects of that policy - everybody that's going to be under that policy or trying to make that policy work - unless they understand what those ramifications are - then you've got no business in making the policy in the first place. I can say that all the students will wear a school uniform and probably get three other trustees - just a hypothetically - I mean I'd hate to do it but I could make a policy - totally unworkable - and I could also say a student that doesn't wear a school uniform will get thrown out of school - absolutely unworkable - unfair to tell our administration that they have to admin-

ister that policy - unfair to the teachers that have to tell those kids they have to go home - unfair to the kids - should get thrown out as a trustee for doing it - so I have to understand. I have to go into the schools personally - I have to understand what it's like in XXXXXXXXXXXX - the majority of the kids wear jeans - that the kids come - a lot of them come from a poor background in as far as resources go and as far as - and you certainly could not in our system lay that sort of policy down - and you have to be - when you're making a policy you have to make certain - as far as is humanly possible - that you are aware of the results of that policy and how it's going to affect - and that there are no negative things for the students themselves.

I: I wonder if you could outline for me then in your own words - what are the attributes or elements of a good policy - what is it that characterizes a good policy?

R: Policy has to be workable. Policy has to have a certain result and it has to work towards the betterment of the system.

I: When you say a certain result do you mean in fact the betterment of the system or do...

R: Yeah - it has to achieve the desire that you lay down and it has to be done in such a way that it doesn't cause more problems than existed prior to the policy being laid down.

I: So workability is high on your list of characteristics of a good policy?

R: Oh it has to be!

I: Are there any others that come to mind?

R: Offhand no.

I: Ok - how about if we look at it from the other end - what kinds of things characterize a bad policy? Obviously something that's unworkable.

R: I suppose a bad policy would be a policy - again like I say the way - the results - although they might achieve what's desired in the first place - may cause later on more problems than existed in the first place - and the example that I gave of the school uniform possibility is quite a good example where - after six months we might have a really smart looking school, but we'd also have it half empty at the same time - and we'd probably have the majority of parents up in arms - it would be - it's a ridiculous sort of scenario to pick up but that would be an extremely bad policy - but it might be in some people's eyes, an excellent goal to have - to have all our kids lined up like they used to be in \*\*\*\*\*.

I: I don't want to put words in your mouth here but I'm getting a strong sense that acceptability by the

people concerned is also an important characteristic of a good policy.

R: Well acceptability and - I wouldn't say that it necessarily has to be acceptable by all concerned, but I think it's necessary that even if it's not agreed upon by those - you have to be able to give good reason as to why you want that policy.

I: Failing acceptability it must be understandable?

R: That's correct - not only understandable, but you have to as a trustee, have to be able to go down to that particular group and say "Ok, you may not agree with it but this is the reason why we have done it. Like it or not, this is how it's going to be. We have taken all of your points of view into consideration, but we're going ahead with it anyway."

I: Alright. Can you give me any examples of a good policy as opposed to a bad policy? I think you've given me an example in the school uniform one - can you give me an example of a good policy?

R: Well I suppose you could go back to a very simple policy stating that students leaving the school will walk on the sidewalks. Now, to me, that's a very sensible policy - they won't walk across the road. What other ones can I think of off hand?

I: Well that meets your criteria that one - right? - it's a reasonable thing - it's understandable - it's probably acceptable and it accomplishes a specific end.

R: That's correct. I don't know - if you had your policy manual in front of you you could probably justify lots of the changes that we made, but just off the top of my head, I can't think of them.

I: Ok. How have you arrived at the conclusions that you have about what constitutes a good policy - what constitutes a bad policy?

R: Well - as to what constitutes a good policy we all work in an organizational type of system and so we all know what policies are and what they can be. If somebody lays down a bad policy - you know - you can make a policy and you can enforce a policy - but the people that you enforce it on - even if they're working just obeying the policy - they may not make it. You have to be able to tell teachers this is the policy and this is the way we want it done and why - and the majority being reasonable people will follow it on. If you enforce a policy on them, they may obey the rules because they want to keep their jobs but they won't necessarily make it work for you. So, I suppose, I can do the same thing in my organization - a policy may be laid down - quite frequently I suppose - I bend the policy quite a bit in my own personal life - but I do know what effects policy has on myself.

I: So really it's a personal view that has shaped your...

R: That's right - as well as bearing in mind that in school districts, we're not dealing in objects, we're dealing in human beings and we're dealing with students and teachers - it's a very labor intensive thing and once you're dealing with people you have to be humane.

I: How do you evaluate policy - you know - when you are forming policy - are there any guidelines that you use - obviously you are going to check them against the criteria that you have established now as being good policy - is there any other way that you have of knowing that it's a good policy?

R: Well, I don't think that you'd necessarily know - you would hope it was going to be a good policy - anyway, you would just try in your own mind to work out if this policy's in effect, what will happen?

I: What are the implications?

R: That's right, if it's there - and if it's not there - which is better - to have it or not to have it? Or, should there be something different?

I: So you do some little mental scenarios then?

R: Most certainly.

I: Ok. Have you had any particular experiences as a trustee which have shaped your views about policy?

R: No - not really - no.

I: Ok. Well, this research that I'm doing is concerned with how trustees think about policy and policymaking in the sort of abstract sense. It's my feeling that the way trustees think about policy and policymaking might well have an influence and a bearing on the kinds of policy statements that emanate from a particular board. I'm just wondering what your reaction is to that premise?

R: Yeah, I suppose you have to look at each person individually. You have to look at where the person is sitting on the board - like I say, the majority of people sit on the boards because of a genuine wanting to make a better school system - a better world for their students. There's a tremendous amount of pressures that go into this policymaking and that can come from the sides such as political and all the rest of it. Where does the thought come from in the first place or where - it's very hard to say. I think you're correct to a certain extent - if an individual - you say "I think this is a good idea." But, when you get into a group of seven, you have to be able to listen to what the others think - you have to be prepared to change your mind because somebody's put a very good reason as to why that's not working - you have to be prepared and able to put your own views and maybe change other people's minds.

I: You're describing almost a bargaining process here...

R: Not necessarily bargaining - I'm not saying I'll change mine if you change yours - I'm saying you have to be prepared to accept that you may not be right.

I: Ok - what you're saying perhaps then is that there is this personal perspective that people bring to it but that perhaps some of the rough corners get rounded off - there's a transition that takes place sometimes and sometimes not.

R: That's right - yeah.

I: Ok. Do you think that this kind of research is worthwhile - looking into the way trustees think about policy and policymaking?

R: I don't really know if I'm in the right position to comment on that.

I: Can you see any value to it?

R: Yeah - because the more of that sort of thing that is researched, then maybe the more understanding as to how our system can be made to work better. I'm not suggesting that it can be researched the way that - you know - there's always a danger - Orson Welles - you'll be able to research it so well that you'll be able to put the ideas



into our heads - but I think it's a good exercise. I really don't have that much experience into that sort of thing coming from a very sort of un-education background, I really can't comment.

I: That's ok - I'm really just looking for your feelings kind of thing. The kinds of questions that I've asked you - I've been attempting to gain some insight if you like into your own mind set about policy and policymaking - do you think that the questions that I've asked are suitable to that task? Will they give me an insight into what you think about policy?

R: Yeah - I think they will. I think - obviously you've homed in on policy which isn't necessarily the biggest thing that's in a school trustee's mind - it isn't our major - it's part of it - it isn't necessarily - you've also given me actually - possibly going back to your previous question - maybe have made me think more about making policy - so again, there has to be something - yeah, I would say it is - I tend to be one of those people who get asked a question now - then I think about it for an hour - not only can I give a good answer later on but it makes me think about it and leads on to something else.

I: Well, is there anything that you'd like to add that you think I haven't perhaps covered in the questions and that might be of significance to this study?

R: Not really - no.

I: Well, I'd like to thank you for the time that you've given me.

R: Well, I hope I've been of some contribution.