A WALLACE-READER'S DIGEST FUNDS PROJECT

MONTANA

STATE ACTION for EDUCATION LEADERSHIP PROJECT

RESEARCH TO SUPPORT THE REDESIGN OF EDUCATION LEADERSHIP IN MONTANA

Council of Chief State School Officers
Education Commission of the States
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State Action for Education Leadership Project—Montana

The Wallace-Reader's Digest Funds, in conjunction with the Council of Chief State School Officials, have launched a project aimed at "fostering a national movement to attract, prepare, and keep high-quality school leaders" (2001). The project lists six strategy areas seen as crucial to the development of comprehensive policies that will attract, prepare, and support educational leaders.

This report will serve to inform those preparing to develop such policies in the state of Montana. The six key areas are: (1) state priorities for and approaches to school leadership; (2) the candidate pool; (3) education and professional learning; (4) licensure, certification, and program accreditation; (5) conditions for professional practice; and (6) authority for practice and governance structures. An additional topic is included regarding women and minorities in educational leadership.

Shortage of Qualified School Leaders

The Montana School Boards Association (1999) sponsored a study focused on the shortage of qualified principals and superintendents in the state. The study found that of the 105 responding superintendents, 50% were planning on retiring within the next five years. Of the 126 principals, 26% were planning on retiring within the same time period. Of the 73 school board chairs and of the 67 superintendents who had hired administrators in the last three years, only 20 school board chairs and 10 superintendents indicated having no problems in filling the open positions. Most often, board chairs and superintendents indicated the pool of applicants was too small, or individuals in the pool were not well qualified.

Individuals qualified for administrative jobs, but not currently working in the position, indicated 60% had applied for an administrative position, but only 23.6% were offered the position. These individuals indicated that 54% of them planned to apply for administrative positions in the future, but most indicated they had not yet decided when they would apply. The next most common

response was they would apply within the next two years. Upon further analysis of the individuals qualified for, but not currently working as, school administrators, 57.3% of the respondents indicated they were working in class AA schools, with the next most (15.5%) working in class A schools. When separated into regions of the state, most were working in the Missoula area (21.4%), the Great Falls area (18.2%), and the Bozeman area (18.2%), and the Billings area (16.8%). These are the most populated areas in the state, and thus relocation issues along with salary issues were contributing reasons why these individuals decided not to pursue or take administrative positions outside of their communities.

The Montana Statewide Education Profile, published by the Office of Public Instruction (OPI) (2001) reports that in the 1998-99 school year, school districts were beginning to experience more difficulty filling teaching and administrative positions than in the past. Another indication that teacher and administrator positions would get more and more difficult to fill was the drop in the number of initial teacher certifications issued by OPI from 1996-97 to 1998-99. There was a 6% decline in the number of certificates issued during that time period.

However, a recent study conducted by the Certification Standards and Practices Advisory Council of the Montana Board of Public Education found that of the 354 school systems with accredited schools who filed fall reports for the 1999-2000 school year, only 5% indicated they found the principal position hard to fill during the last five years (Nielson, 2001). Only 2% indicated it was difficult to fill a superintendent position during that time period.

The Institute for Educational Leadership's *School Leadership for the 21st Century Initiative* recently published a paper dealing with the shortage of qualified, high-quality principals in our nation. The IEL paper suggests questions to consider for those developing policies that address this issue. IEL's suggested questions can be used to approach both principal and superintendent shortages. Following is an adaptation of these questions for policy makers in Montana. These questions will be addressed in this report.

- Are we facing a school administrator shortage in Montana? What data do we have to help answer this question?
- What reasons do school administrators give for leaving the position? What reasons do teachers and others give for not pursuing school administration?

- Are school administrator recruitment practices in Montana sufficient to meet the need for qualified and effective leaders for student learning? How do current school administrators support recruitment efforts?
- Do proportions of women and minorities in school leadership positions in Montana mirror the representation of women and minorities among our student body? If not, how can we support more representative recruitment practices?
- Do we actively encourage nontraditional school administrator candidates to pursue the position? Do we ensure effective leadership for student learning by holding those candidates to high standards and requirements the same or similar to those applied to other candidates?
- Do we operate and support retirement systems that allow school leaders to move from state to state? Do our retention efforts ensure that high-quality school administrators will serve in Montana?
- What can we learn from other states who are having more success filling their schools with effective leaders?
- Do our school systems offer school administrators sufficient compensation to attract and retain high-quality leaders for student learning that we need?
- What data do we have on the current school administrators in Montana and the generation that are expected to replace them when they retire?

I. State Approaches to Educational Leadership

States have authority for determining the qualifications and preparation of school leaders and for establishing the conditions they practice under. In order to strengthen school leadership, state policies must be developed that provide incentives for practice. States can establish new definitions of educational leadership by focusing on leadership for student learning. Statewide standards for assessment of school leaders can be established that impact this focus on student learning, and not just administrative tasks of traditional school leadership. Practices of principals and superintendents should be related to those of teachers and students (Council of Chief State School Officers, 2001).

Leadership for Student Learning

The primary goal of education today is improved teaching and learning. States can assist school leaders in accomplishing this goal by supporting them in their focus on teaching and learning, instead of state support on existing management-based leadership models. No doubt much of the management activities school leaders are engaged in on a day to day basis is important, however, much of it does not directly impact student learning. "Principals and superintendents in today's schools are undermined in their efforts to promote student learning when the expectations and responsibilities that they must fulfill do not focus on, or include, the goal of improved student learning" (Council of Chief State School Officers, 2001). Often the authority school leaders are given to accomplish the goal of increased student achievement is not commensurate with the assignment. School leaders must be given the authority to make their own hiring decisions and create specific job descriptions to meet their students' needs.

Standards and Assessment

Many states have implemented standardized testing of principals and superintendents that are often performance-based. The Council of Chief State School Officers (2001) recommends that states support change in the role and definition of educational leaders by establishing the central goal of improved teaching and learning. They recommend states develop standards based on this goal to assess principals and superintendents. The National Council for the Accreditation of Teacher Education (NCATE) has applied standards to educational leadership programs that prepare principals

and superintendents since 1997. And in the last several years, many states have adopted standards created by the Interstate School Leaders Licensure Consortium (ISSLC), along with an assessment based on the standards, as a means of licensing principals. The National Policy Board for Educational Administration (NPBEA) is currently studying a proposal to align the NCATE standards for the review of educational leadership programs with the ISSLC Standards for licensing principals.

The ISSLC Standards emerged from a set of guiding principles. Those guiding principles are:

- Standards should reflect the centrality of student learning.
- Standards should acknowledge the changing role of the school leader.
- Standards should recognize the collaborative nature of school leadership.
- Standards should be high, upgrading the quality of the profession.
- Standards should inform performance-based systems of assessment and evaluation for school leaders.
- Standards should be integrated and coherent.
- Standards should be predicated on the concepts of access, opportunity, and empowerment for all members of the school community (Murphy & Shipman, 1998).

Based on these guiding principles the ISSLC Standards were developed (see Figure 1). For a complete description of the ISSLC Standards along with knowledge, dispositions, and performance standards of each of the six major standards, see Appendix A.

Figure 1. The Interstate School Leaders Licensure Consortium Standards.

ISSLC STANDARDS
A school administrator is an educational leader who promotes the success of all students by facilitating the development, articulation, implementation, and stewardship of a vision of learning that is shared and supported by the school community.
A school administrator is an educational leader who promotes the success of all students by advocating, nurturing, and sustaining a school culture and instructional program conducive to student learning and staff professional growth.
A school administrator is an educational leader who promotes the success of all students by ensuring management of the organization, operations, and resources for a safe, efficient, and effective learning environment.
A school administrator is an educational leader who promotes the success of all students by collaborating with families and community members, responding to diverse community interests and needs, and mobilizing community resources.
A school administrator is an educational leader who promotes the success of all students by acting with integrity, fairness, and in an ethical manner.
A school administrator is an educational leader who promotes the success of all students by understanding, responding to, and influencing the larger political, social, economic, legal, and cultural context.

The standards developed by NCATE for educational leadership can be read in Figure 2. For a complete listing of standards under each of the main areas see Appendix A.

Figure 2. The National Council for the Accreditation of Teacher Education Standards for Educational Leadership Programs.

NCATE STANDARDS for Education Leadership Programs
Area I. ***Strategic Leadership****: The knowledge, skills and attributes to identify contexts, develop with others vision and purpose, utilize information, frame problems, exercise leadership processes to achieve common goals, and act ethically for educational communities.*
Area II. ***Instructional Leadership****: The knowledge, skills and attributes to design with others appropriate curricula and instructional programs, to develop learner centered school cultures, to access outcomes, to provide student personnel services, and to plan with faculty professional development activities aimed at improving instruction.*
Area III. ***Organizational Leadership****: The knowledge, skills and attributes to understand and improve the organization, implement operational plans, manage financial resources, and apply decentralized management processes and procedures.*
Area IV. ***Political and Community Leadership****: The knowledge, skills and attributes to act in accordance with legal provisions and statutory requirements, to apply regulatory standards, to develop and apply appropriate policies, to be conscious of ethical implications of policy initiatives and political actions, to relate public policy initiatives to student welfare, to understand schools as political systems, to involve citizens and service agencies, and to develop effective staff communications and public relations programs.*
Area V. ***Internships****: The internship is defined as the process and product that result from the application in the workplace environment of the strategic, instructional, organizational and contextual leadership program standards. When coupled with integrating experiences through related clinics or cohort seminars, the outcome should be a powerful synthesis of knowledge and skills useful to practicing school leaders.* (For a complete description, see Appendix A.)

Recommendations

The National Association of State Boards of Education's (1999) report of their Study Group on School Leadership recommends the following options be considered by state policy makers in order to build a standards-based principalship:

- Develop standards that reflect the complete scope of knowledge, skills, and dispositions needed to be good principals.
- Foster a system for developing public consensus around standards.
- Undertake formative and summative evaluations of principals.
- Allocate resources to best impact the neediest principals' ability to meet standards.
- Align accreditation and professional development with standards.

Distributive Leadership

Distributed leadership means leadership that is shared by all of the individuals responsible for the education of students. It requires that all of these individuals work together to establish new relationships, agree on a shared purpose, and a common culture of improved student learning. It also requires that a clear, coherent plan be in place that outlines roles, responsibilities, and expectations of everyone involved. States can support local school districts in utilizing recent innovations in distrib-

uted leadership models (Council of Chief State School Officers, 2001). This can only happen where professional information is shared through a strong network. Therefore, states should support effective information networks.

Comprehensive Policy Development

States must initiate policy reform and involve all of the key parties in the process models (Council of Chief State School Officers, 2001). These policies must respond to the key issues involved. Unless a reform proposal is designed to specifically address the issues that surround a topic, it is unlikely to result in any change. The policies that are developed must be aligned to any reform programs that currently exist. For example, any policies designed to support principals and superintendents should be aligned with existing reforms in teacher quality, and statewide standards and accountability. The Council advises against approaching policy development in a piecemeal fashion, but rather by understanding the complex interplay between and among reform initiatives. This would more likely result in a comprehensive, coherent system designed to meet the goal of higher student achievement.

Accountability

Many states have required local school communities to develop school improvement plans as a means of improving educational outcomes. School improvement plans are the result of the 1980s effective schools research. An important finding of this research is that if local schools and communities set their own goals and define how those goals will be met, they will more likely be successful in meeting those goals. Generally, plans are developed collaboratively with representatives from parents, the community, teachers, school leaders, and school board members. In these states local schools are held accountable for meeting their goals. Primary means used to improve student and school achievement are holding high expectations for student achievement, decentralized decision making, goal setting, active participation from various representatives, and meaningful on-going teacher education and professional development.

Being held accountable for improved student achievement has its consequences. A study of local accountability in 23 school districts in 8 states explored those consequences (Goertz, 2000). The study found that state and district defined accountability systems and policies did provide a clear focus for teachers and principals about the attainment of student outcomes. Educators generally faced few formal consequences for not meeting school, district, and state performance goals. The study found that when formal consequences did exist, they fell more heavily upon students and principals than on teachers. In fact, teachers in the study faced few consequences for poor student performance. Student achievement data was vital in the use of district and school-based decision making. Many of the school districts studied used the school improvement planning process as a major instrument to inform and influence change.

A study of North Carolina's use of school improvement plans found many side effects as a result of using the process in a local school community (Johnson, 1998). The state and local testing program dominated discussion on the focus of school improvement plans. Individuals have been exposed to new, personally disturbing information about instructional ineffectiveness. It has also fostered personal understandings about roles in the educational process. Committee systems were reorganized and staff relationships re-evaluated. Faculty have been made more aware of diverse educational needs of their students. The study found that principals are the linchpins in establishing change.

The Rural School Context and Local Accountability

The context of the rural school should not be forgotten in the current push for a centralized system of accountability through national goals of education, and national assessment measures, along with school choice policies (Hurley, 1999). Hurley believes that state established standards may help some schools, but locally established standards "fuel the development of genuinely good rural schools. . .Locally established standards are powerful motivators of students, teachers, and parents". According to Morris and Potter (1999) the internal governance of rural and small town schools most often follows an outmoded administrative theory and is frequently authoritarian and traditional. However, because of the often times small number of people many rural and small town

district organizational structures are more decentralized. Smith (1999) encourages rural and small town school administrators to take advantage of this structure in order to make the rural school a more powerful component in community life. Specifically, this could facilitate economic and social development.

Specifically, rural school administrators should be trained to think within a rural context (Smith, 1999). This is something that is rarely taught in school administrator preparation programs. Smith explains that rural school leaders ". . . . should also be trained to act within such a context—behavior that requires courage, perhaps, in an era of national standard-setting and standardized test accountability systems geared to an urban school model and urban, industrial and largely impersonal economic aspirations". She cites the abundance of literature on which to base a reexamination of rural and small schools. Rural schools typically use an alternative organizational model—one that is student and community centered, place sensitive, and where the basic content areas are balanced with lessons in compassion, concern, and connections.

Comparison of Best Practice and Current Practice in Montana

According to the Council of Chief State School Officials, the primary goal of educational leadership is to improve student learning. Consequently, many states have adopted the Council's Interstate School Leaders Licensure Consortium (ISSLC) standards as a basis for accrediting preparation programs for educational leaders, and assessing individuals for administrative certification. Additionally, preparation programs for educational leadership are using the standards as a basis for program development and assessment. Also, states are using the National Council for the Accreditation of Teacher Education (NCATE) standards as a basis for college accreditation standards.

The state of Montana attempted to embed the NCATE standards inside of its unit standards (see Professional Educator Preparation Program Standards in Appendix A). Unit standards pertain to the overall administrative unit that houses professional educator preparation programs. The effect of this has been to shift the emphasis of accreditation from inputs to performance outcomes, and to align state standards with those nationally recognized by the profession. Currently, a new draft of

the NCATE Standards appears to mirror the ISSLC Standards The ISSLC Standards have been used in development of the educational leadership program at Montana State University in Bozeman.

II. The Candidate Pool

"States are generally responsible for developing and supporting policies designed to expand the candidate pool and improve the overall quality of educational leadership in schools by attracting highly motivated and effective individuals into leadership positions" (Council of Chief State School Officers, 2001). The State Action for Education Leadership Project promotes several methods by which states can achieve this. States can authorize stronger recruitment incentives, design and implement expanded training opportunities, and assure effective procedures for local school districts to employ principals and superintendents.

School Administrator Profile

The National Association of Elementary and Secondary Principals conduct a ten year study, with the most recent one completed in 1998. From data generated by this study, Doud and Keller (1998) describe the typical K-8 principal as a 50 year old white male who became a principal at age 36. He earns $60,285 and works in a suburban school with an enrollment of 425 students. He has worked as an educator for 25 years and has been employed in the same school for the last six years.

Every ten years the American Association for School Administrators conducts a survey of superintendents employed in the nation. The most recent survey was done in the year 2000 (Glass, Bjork, & Brunner, 2000). Historically, more secondary principals, who were secondary teachers, become superintendents. More secondary principals become superintendents across all sizes of districts. This may occur because secondary teachers are more familiar with the greater degree of bureaucracy in secondary schools and may find administration more desirable than elementary teachers. Plus, secondary teachers are exposed to more leadership opportunities, such as departmental leadership positions. They are also more likely to obtain leadership opportunities that involve some kind of community contact, such as coaching. On average superintendents in the study spent five to seven years as classroom teachers.

In a study of individuals who received administrative certification in 1996-97 in Montana, only 10% of administrators were under the age of 40, implying that teachers generally enter administrative work in their 40s (OPI, 1999). Wolverton, Rawls, & Macdonald (2001) studied superintendents in the northwest region and found that most of them spent 16 years in education, and averaged 7 years in their current position. They had held an average of three different administrative positions.

A database of all the superintendents who served in Montana from 1977/78 to 1997/98 was compiled (Carson, 1999). The annual average turnover rate was 20%. For small, rural school districts with a school district population under 1,000, the annual average turnover rate was 27%. During the 20 year time period, the state-wide average length of time a superintendent spent in one district was 5.1 years. For small, rural school districts the time spent in one district was four years.

Both principals and superintendents reported great degrees of job satisfaction (Doud & Keller, 1998; Carella, 2000; Glass et al., 2000). In these studies the majority of school administrators reported they would choose to do the job again, and feel they are making a significant impact in the lives of children.

Superintendents and principals most often indicated that they decided to become a school administrator in order to make a greater contribution to education (Montana School Boards Association, 1999). Second or third reasons were for professional advancement or for a greater challenge than their previous positions held.

Barriers to Deciding to Become a School Administrator

The National Association of Elementary School Principals and the National Association for Secondary Principals conducted a thorough study to determine if there is a shortage of qualified school administrators in the nation (*Is there a shortage of qualified candidates for openings in the principalship?* 1998). They believe that every school improvement plan depends on strong school leadership. A shortage of those leaders would have a detrimental effect on our nation's children. Their study revealed that the top three ranked barriers for teachers not to decide to be principals

were: (1) compensation insufficient compared to job responsibilities (60%); (2) job was too stressful (32%); and (3) the principalship would require too much time (27%).

Another study found similar results (Moore, 1999). The top three inhibitors for teachers aspiring to be principals were increased time, influence of outside groups, and too much bureaucratic paperwork. Superintendents were recently surveyed and asked why the number of superintendents were dwindling (Cunningham & Burdick, 1999). Most often they blamed school boards for the decreasing number of superintendents. Specifically, they identified school board's inclination to micromanage. Confirming results from previous studies, they found that time and stress demands, plus diminishing financial resources available to school districts were reasons why aspiring superintendents are reluctant to enter the field. The latest study of the American Association of School Administrators found that the top three reasons that superintendents gave for factors that inhibit their effectiveness were inadequate financing, too many insignificant demands, and state reform mandates (Glass et al., 2000).

A recent study derived data from what human resource directors see as important issues for education of children in the 21st century (Tonneson, 1999). The study found that respondents believe the shortage of teachers and school administrators are likely to continue. Additionally, they believed inadequate funding is the variable that will have the greatest impact on personnel administration in the 21st century.

A study in Pennsylvania found that although there is an increase in the number of people becoming certified to be school administrators, the pool of applicants for school administrators is shrinking (McAdams, 1998). The author believes that one of the reasons for this is the impact of two-income households. Financial incentives for taking a principal position have changed due to the increase in dual income families. Another reason is the changing demands of work and family. The job's added time commitments result in less time administrators can earn money to supplement family incomes. When administrators were teachers they could choose to take additional jobs in the summer or part time jobs outside of their school obligations. This is difficult for school adminis-

trators. Additional reasons are the effect of higher teacher salaries, the loss of job security, and the financial impact associated with moving to a new area for an administrative position.

A study of experienced administrators who are choosing not to join administrative applicant pools was done in New York State (Boehlert & O'Connell, 1999). Findings show that some of the reasons administrators did not apply for higher level positions were lack of experience, relocation difficulties, inadequate compensation, district problems, stress, and time demands. Because of the statistical significance found between gender and the discriminatory reasons for not applying, the authors recommend women need to be encouraged through mentoring, job shadowing, or leaves which allow them to gain further experience. They also recommend that school boards recognize the demands of the job and be more realistic in determining salary ranges. Additionally, they need to realize that men and women may not be able to relocate to a district to take a superintendency when the district requires residency. Respondents often requested that retirement benefits be added due to an increased work day and work year to address some of the monetary issues they defined.

Wolverton et al. (2001) studied superintendents in the northwest region and found that 82% of them were not seeking administrative positions because they were content with their current position. They also reported that low pay differentials, stress, and politics that surround the superintendency were disincentives. Current superintendents rated all constraints higher than non-superintendents, leading the authors to conclude that actual realities of the job may make the position even more undesirable than aspirants might imagine.

Individuals who were qualified, but not working in administrative positions in Montana were questioned about why they were not applying for administrative positions (Montana School Boards Association, 1999). The factors most often mentioned for not applying were salary too low for job responsibilities, conflicts with desired life style, place bound/unable to move family, and longer working hours associated with an administrative position. The second most often mentioned reason for not applying for administrative positions was in the "other" category. Respondents most commonly referred to problems in relocating to take administrative jobs in this category.

In the same study school board chairs and superintendents ranked inadequate school funding as the top problem faced by school administrators. Principals ranked this problem third, while long working hours were ranked first. Other problems ranked in the top four were conflicts with parents/community members, job too stressful, salary too low for job responsibilities, collective bargaining/labor relations, and societal problems such as poverty, and no family support.

Attracting and Recruiting School Administrators

Many studies have found the same results when asking practicing school administrators and those who are qualified for the position, but not seeking to work in the field. One study found that in Michigan if the job of school administrator was restructured with more emphasis on curriculum and instruction and less emphasis on budget, legal issues, and district level responsibilities, more people would be attracted to the job (Moore, 1999). The study also recommended that the work week and work year be reduced, more support services be added, school administrator's authority and responsibility be increased, and a cadre of local administrators be nurtured. The same suggestions were found in an article written by McAbe (1998). He adds that in order to nurture a cadre of future administrators the work life of the current administrator should be enriched. This could result in an administrator who would be more likely to speak positively about the job to teachers, possibly serving to recruit these teachers into school administration.

In a study aimed at increasing the pool of qualified secondary principals the authors concluded that at the institutional level the changing role of the high school principal should be clearly defined along with a redefinition of the assistant principal, which they see as a "distasteful prerequisite to the principalship" (Yerkes & Guaglianone, 1998). Some other important suggestions are to ensure flexibility of expectations and a variety of job assignments, redesign administrative organizational management structures, encourage a family-friendly environment that accommodates principals' personal lives, review the salary schedule and find ways to reward principals and assistant principals, develop university partnerships, and provide opportunities for teachers to take on leadership roles.

Superintendents on the job in Iowa Public Schools were part of a study designed to find out what would motivate them to enter the superintendency or remain serving in the position (Diebel, 2000). Variables found to be important for superintendents seeking a position were age, degree, years of service, district size, work load, location, and career plans. Variables important for superintendents who chose to remain in their positions were age, degree, years of teaching, years of service as a superintendent outside of Iowa, district size, location, and career plans.

Superintendents and principals studied in Montana agree the three incentives that would most encourage them to remain in school administration were improved salaries, improved retirement benefits, and increased earning power after retirement (Montana School Boards Association, 1999). In the same study, school board chairs indicated the four incentives they used most often to keep qualified administrators were negotiating with the board for salary and benefits, offering competitive salary, paying dues for professional associations, and offering money and support to attend professional development activities.

Based on results of the most recent national ten year study of elementary and secondary principals, Doud and Keller (1998) have several recommendations that would prevent what every two out of three principals see as a problem. These principals are concerned that there is a problem in attracting quality people to the principalship. The authors recommend that current principals take greater responsibility in encouraging and developing their replacements. They must nurture the leadership talent of others and help to identify, encourage, and mentor school leaders. Secondly, school districts should initiate aspiring principal programs for talented teachers. Third, school districts should work collaboratively with university preparation programs and state principal associations to develop programs that will attract good candidates. Next, state legislators should fund recruitment of under-represented groups to the principalship, examine the adequacy of principals' compensation, and minimize conditions contributing to unnecessary stress on principals. Lastly, states that have tried to reduce expenditures by encouraging experienced administrators to retire early through "buyout" options need to devise incentives to keep retirement-eligible principals from leaving.

As a result of state and local retirement incentives in Illinois administrative personnel, the number of superintendents and principals have been greatly reduced (London & Sinicki, 1999). They believe a program is needed to make sure new principals hired to fill the positions are supported. The program they promote is similar to peer coaching for teachers, but instead targets principals.

The Grow Your Own Model of Administrator Recruiting

Because of the current administrator shortage and implications for the future shortage, many school districts are considering nurturing their own group of school administrators to fill vacancies. In fact, after an extensive review of literature and surveying about 100 administrators throughout the United States, Yerkes and Guaglianone (1998) recommend the best single solution to solving the shortage of high school principal applicants is to "grow your own" administrators. This means targeting prospective leaders from within the organization, encouraging them to pursue leadership, and giving them opportunities to lead.

The Yukon Territory in Canada currently employs a large number of administrators who will retire over the next five years. They are considering a new approach to develop talent already in their district, by recruiting teachers to fill the positions (Blakesley 2000). First, they are asking what factors discourage and deter teachers from pursuing a career in school administration, if the nature of the job is such that it needs to be modified to make the position more attractive, and how learning opportunities can be designed and implemented so that the transition from teacher to administrator can be more easily made.

In California, the Capistrano Unified School District has taken what they call a proactive approach to solving the shortage of principals (Lovely, 1999). The district has developed a structured "grow your own" program. The program consists of four separate yet interrelated parts. In the *teaching assistant principal* module strong teachers with leadership potential are recruited. These teachers are still assigned to the classroom full time but are given experiences designed to broaden their skill in instructional and administrative tasks. Participants can earn an annual stipend. Individuals working in the *assistant principal* module may have a shared assignment working on two

different campuses. The position is designed to give each assistant principal experiences and skills required to be a principal. The third module is a *mentoring program for new principals*. A veteran principal is assigned to work with six first-year principals. Regular phone contact, site visits, and job shadowing are designed as a part of this module. *Outreach to all principals* in the school district is the final module. This consists of monthly meetings aimed at team building, problem solving, and planning.

Concrete steps districts can take to develop leaders from within the organization were suggested by Yerkes and Guaglianone (1998). They recommend creating district leadership development program partnerships with a university, begin an aspiring administrator program, provide authentic leadership experiences for teachers, encourage women and minorities to become administrators, use university administrator preparational faculty to scout and recommend quality candidates, develop administrator mentor programs through both universities and professional organizations, and use administrator internship programs.

The National Institute on Educational Governance, Finance, Policymaking, and Management (1999) suggests schools recognize potential leaders in their districts and give them structured opportunities to demonstrate skills and build experience. In San Antonio Public Schools "instructional guides" in each school are identified. They are expert teachers with leadership potential. These teachers are given extensive professional development and help others in their schools improve their teaching. In New York City, Community District #2 is working with New York University to develop a program that certifies excellent teachers with leadership potential as principals. These teachers are identified and recruited by principals, and the district pays part of the costs of certification.

Wallin (1999) explains the need for rural educators to recruit future leaders from within in order to fill the many positions left vacant in rural schools. She describes how individuals with administrative potential within the organization should be encouraged to put themselves forward with the assurance that their leadership potential will be aided and developed by school board support. Each school should identify a pool of potential leaders, train these leaders, and plan for them to

eventually take on leadership positions within the school. Also school boards should develop policies for recruitment, selecting, and training internal administrators. Internal selection is especially needed in rural schools where many times administrator positions are hard to fill. Rural schools often can not compete with the higher salaries and additional benefits urban schools can offer.

Wallin continues to explain that rural schools often seek externally to fill job vacancies because they desire a "fresh perspective", or desire an applicant with new skills or experiences. Sometimes external searches may be more expedient than internal searches. External applicants may be found that appear on paper to be a better fit than internal candidates. Problems with trying to recruit externally for an administrative position in a rural school are that the outside candidates are not as well known and thus risk poor performance or leaving the school. Also, hiring externally can block career advancement opportunities for internal employees.

Morris and Potter (1999) encourage rural school districts to provide aspiring administrators first-hand experiences by giving them administrative tasks as a way of educating them. This is a means of developing and maintaining a talented pool of potential individuals who will become the future leaders in a rural school district.

In Montana, a high percentage of school board chairs (68%), superintendents (76%), and principals (91%) indicated they encourage qualified individuals within their school districts to apply for administrative positions (Montana School Boards Association, 1999). A high percentage of board chairs (97%) also indicated their school districts did not have a formal mentor program for new administrators, while at the same time 77% of the principals surveyed indicated that such a program would have been helpful to them.

The act of hiring leaders from within the organization has benefited 68% of the superintendents responding in the American Association for School Administrator survey (Glass et al., 2000). These superintendents said they were hired from inside the organization, meaning they were already working in the school district. In urban areas more superintendents were hired from within the organization. Glass states that the lack of high qualified outside applicants might play a role in selecting an inside candidate in a large school district.

The National Association of State Boards of Education's (1999) report of their Study Group on School Leadership recommends the following options be considered by state policy makers in order to attract and retain quality school leaders, specifically principals:

1. Use the *tap on the shoulder* strategy. Practicing principals should use a formalized *tap on the shoulder* strategy to recruit high-quality diverse candidates to the principalship. Principals should be encouraged to nominate potential candidates who meet state-defined criteria. "States may consider ways in which they can help currently practicing principals develop the capacity to recognize among their staff the types of leadership and management potential called for by state principal standards" (p. 18).
2. *Home grown recruitment and aspiring principals' programs.* Individuals recruited from the local community may be more likely to remain in the school district once they become principals. This may be an effective strategy to recruit principals to schools that have a hard time filling the position. States should provide technical and financial assistance to local recruitment programs.
3. *Incentive programs.* Incentives could be offered upon entering, completing a preparation program for educational administration, and accepting a position in a hard to fill principalship. Bonuses, home-buying grants or low-income mortgages, relocation expenses, college loan forgiveness, and tuition reimbursement have proven effective incentives in teacher recruitment. Some states have implemented scholarship programs and systems to repay graduate student loans for candidates who earn a principal certification and then practice as a principal in the state. The Study Group recommends further incentives be offered by states, including restructuring preparation program class times and locations, and restructuring extensive internship experiences. These may result in candidates having to take significant leave from work. States may also consider providing work release time with pay to pursue study and internship activities.

Recruitment Practices

Winter (1997) advocates a recruitment-as-job-marketing theory be used by educational organizations. Traditionally, job vacancies in educational organizations have addressed specific job responsibilities of vacancies, or job attributes that are work contextual. These job attributes address the needs of the organization. When advertising job vacancies using Winter's theory, the job description would address the job-related needs of applicants. His research and others have shown that experienced educators are more likely to apply for a position "if the job is depicted with intrinsic job attributes (innovation, responsibility, achievement) rather than with work context job attributes". His research has also shown that intrinsic job attributes are especially attractive among experienced female applicants. Intrinsic job attributes focus on applicants' needs for self-actualization rather than on basic survival, such as salary and job security.

In a survey of school board chairs and superintendents in Montana, 97% of the school board chairs indicated that their districts did not have a plan to recruit administrators (Montana School Boards Association, 1999).

The National Association of State Boards of Education's (1999) report of their Study Group on School Leadership recommends that the most prevalent means of leadership recruitment be re-examined. Currently, the most common source of leadership recruitment is teachers who *self-select* the field of educational administration for graduate study. The study group finds that this approach is not targeted and offers little ability to control the candidate's quality. They explain that usually these candidates enter the field to fulfill their continuing education requirements for teacher certification. Four major problems with *self-selecting* educational leadership are:

1. Candidates who self-select have little chance of being weeded out of educational administration programs, since most programs lack rigor.
2. Many teachers select educational administration for reasons other than to become a principal. Most common reasons are for continuing education credits for teacher certification, or for perceived leverage in hiring and promotion. Most of these candidates are less likely to ever practice as principals. Consequently there are more than enough certified principals, but few that choose to ever practice.
3. Relying on those candidates who self-select educational administration has resulted in a pool of principal candidates who prefer not to work in schools that need them the most. Those are schools with student populations that are minority or disadvantaged.
4. The long-standing system of self-selection has failed to attract many minority candidates to the principalship.

Instead, the Study Group advocates using a targeted recruitment process to attract a diverse group of candidates to educational administration programs. This process would involve a flexible policy environment where programs are held accountable for the quality of their graduates, rather than the processes or structures used to prepare them. The Study Group recommends that policy makers consider implementing targeted **teacher** recruitment and retention policies as part of their principal recruitment strategy, as explained above in *Grow Your Own Model of Administrator Recruiting*.

The Study Group made further recommendations for school districts who have difficulty recruiting principals. According to the report, state policy makers should take action in the following areas in order to recruit principals:

1. Provide incentives to equalize districts' ability to attract high quality candidates.

2. Support local recruitment strategies in hard-to-serve districts.
3. Provide guidance to districts on how to broaden candidate searches to include candidates from outside the district.
4. Establish a clearinghouse to match districts with candidates seeking jobs by publicizing vacancies and candidates in a central database.

Restructuring the Administrator Role

The shortage of school administrators has led to a reconceptualization of the structure of the job. Suggestions were made by Yerkes and Guaglianone (1998) on how to restructure the job of a high school principal to attract more individuals to the job. Other ideas include a co-principal approach. In a recent study, Connell (2000), found that a co-principal model of public school administration might be a viable alternative to the traditional model of school administration if conditions were right. The conditions are dependent on the complexities, demands, and expectations of a particular site coupled with personalities of individuals filling the roles of co-principals. Commitment, collaboration, and communication were found to impact the success of the model as well. In this study, a lack of mentoring for assistant principals was a drawback to the model's success.

After studying the shortage of applicants for the superintendency, Carella (2000), recommends reorganizing the role of superintendent, increasing economic incentives, expanding pension opportunities and training programs, and increasing opportunities for women and minorities.

Rural schools could have flexible staffing arrangements that encourage the development of a pool of potential leaders within the school district (Winter, 1999). Terry (1997) explains his idea for restructuring the principalship. The principal would focus solely on management issues, while other issues would be the responsibility of an instructional/curriculum director. This person would work closely with designated lead teachers who demonstrate mastery of instructional techniques, classroom management, and leadership skills. The principal, instructional/curriculum director, and lead teachers would work as a team to deliver staff development opportunities.

Restructuring the Superintendency in Montana

Because of low student enrollments many schools can employ a superintendent who also serves as either a secondary or elementary school principal. Besides this arrangement, there are small school districts who employ a superintendent on a part time basis, and share the assignment

with a neighboring small school district (Rogers, OPI Director of Accreditation, personal communication, July 6, 2001).

State Funded Programs to Attract School Administrators

For those interested in becoming educational leaders in Washington, the state offers a funded intern program (Council of Chief State School Officers, 2001). The program provides funds to public school districts for partial release time of participants. The *Education Leadership Intern Program* also includes mentorships.

In Mississippi, the state offers recruitment incentives to teachers who are interested in school administration (Council of Chief State School Officers, 2001). Participants in the program receive full salary and benefits for one school year while enrolled in state sponsored educational leadership preparation and training programs. At the end of participation in the *Mississippi School Administrator Sabbatical Program* individuals must agree to employment as administrators in the sponsoring district for not less than five years.

The *Principal Fellows Program* in North Carolina offers incentives of $20,00 per year for up to two years for participants enrolled in full-time state approved school administrator training programs (Council of Chief State School Officers, 2001). The state also offers a program called *Developing Future Leaders* that identifies teachers who have leadership potential and encourages them to pursue careers in school administration.

State Procedures and Authority for Hiring School Administrators

The design of the hiring practice has a significant impact on school administrators. State policies govern the way principals and superintendents are hired and also stipulate who has authority in making hiring decisions within the school district.

Florida shifted the power from state to local for hiring decisions of school administrators (Council of Chief State School Officers, 2001). The legislature concluded that local school districts, rather than the state, are better able to determine an applicant's qualifications for the position of principal or assistant principal. They did mandate that each school district adopt and implement an ob-

jective-based process for the screening, selection, and appointment of assistant principal and principal. All candidates for these leadership positions must successfully complete a statewide examination and fulfill all performance requirements adopted by the State Board of Education.

Principals and superintendents are hired at the local level through locally developed hiring procedures in Texas (Council of Chief State School Officers, 2001). Legislation specifies the minimum procedural guidelines. The superintendent has authority for making all hiring recommendations to the board, other than the superintendent position, while the principal must approve all teachers or staff hired to the principal's school. Superintendents may be employed by contract for a term not longer than five years.

Tenure for K-12 teachers, assistant principals, principals, and superintendents was abolished by the state of Oregon (Council of Chief State School Officers, 2001). Administrators serve a three year probationary term, unless a shorter term is mutually agreed on. The school board may elect to reassign administrators during the term of the contract or non-renew the contract for any "good faith" cause the board deems sufficient. Administrators may also be dismissed or face a reduction in pay during the term of the contract for any reason set forth in state policy. If administrators receive notice of contract non-renewal, and they have three years of successful teaching experience in Oregon, they may fill any vacant teaching position within the school district.

Superintendents in Vermont are appointed by a supervisory union and/or supervisory district board, with advice from the Commissioner of public education (Council of Chief State School Officers, 2001). The Commissioner is appointed by the Governor. Vermont does not require each school district to employ a superintendent, but does require that supervisory unions/districts ensure that all the duties of a superintendent are carried out by principals or other "qualified persons". Principals are appointed by district school boards with superintendent recommendation.

Current Practice for Hiring School Administrators in Montana

In Montana the school board has the ultimate responsibility to "employ or dismiss a teacher, principal, or other assistant upon the recommendation of the district superintendent, the county high school principal, or other principal as the board considers necessary, accepting or rejecting any rec-

ommendation as the trustees in their sole discretion determine. . . .(MCA 20-3-324) (School laws of Montana, 2000).

Recommendations

The National Association of State Boards of Education's (1999) report of their Study Group on School Leadership recommends the following options be considered by state policy makers in order to attract and retain quality school leaders, specifically principals:

- Establish consistent standards that speak to a changing field.
- Enable high-quality diverse recruitment, including women and minorities.
- Improve initial preparation and ongoing professional development.
- Distribute high-quality principals across districts.
- Improve retention and reduce mobility of principals by improving working conditions.
- Improve the consistency and thoroughness of data regarding administrative shortages, and low or inconsistent leadership quality.
- Focus on teacher recruitment as a foundation for effective principal recruitment.
- Infuse standards into local systems of principal recruitment.
- Provide support for aspiring principals programs.
- Provide incentives for individuals who choose to become principals.
- Provide support, particularly in the form of targeted preparation programs and high-quality mentoring, to new principals from outside the education field.
- Evaluate all recruitment and incentive programs for effectiveness and quality of candidates.
- Consider the effects of new policies on the scope of work for school principals.
- Encourage distributive leadership.
- Encourage multi-year contracts and job security across contract years.
- Ensure that principals' compensation is adequate to attract and retain high-quality individuals to all schools.
- Consider incentives for excellent performance.

Comparison of Best Practice to Current Practice in Montana

Montana and regional school administrators, and those aspiring to the profession, typically explain the same reasons that others like them around the nation give for barriers to working in the field. In Montana a study of individuals qualified, but not working in administrative positions, said most often that they were place bound, unable to move their family, or could not relocate in order to take an administrative position (Montana School Boards Association, 1999). They also explained that most often other reasons for not applying for administrative jobs were because of the low salaries associated with increasing job responsibilities, conflicts with their desired life style, and longer working hours an administrative position would bring. In the same study school board chairs and

superintendents ranked inadequate school funding as the top problem faced by school administrators, while principals ranked working long hours as their top problem. Other problems ranked in the top four by school board chairs, superintendents, and principals were conflicts with parents/community, job too stressful, salary too low for job responsibilities, collective bargaining/labor relations, and societal problems such as poverty and no family support.

Similarly, Wolverton et al (2001) found that most superintendents in the region, who were not working in the position, were doing so because they were content with their current positions. They also explained that low pay differentials, stress, and politics associated with the position were disincentives. Current superintendents in the study rated all constraints higher than non- superintendents, leading the authors to conclude that perhaps the actual realities of the job may make the position even more undesirable than aspirants might imagine.

The literature referred to perhaps the best solution in filling vacant school administrative positions as the "grow your own" approach. Here, teacher leaders are identified within the school, encouraged to pursue leadership positions, and given opportunities to lead. A high percentage of Montana school board chairs (68%), superintendents (76%), and principals (91%) indicated that they encourage individuals within their school districts to apply for administrative positions (Montana School Boards Association, 1999). However, most of the school board chairs (88%) said they did not have a formal plan to recruit administrators in their districts.

The optimal scenario would be one in which the school district sponsors the teacher leader by providing release time and money for study that leads to administrator certification. A vital part of this time should be allocated to these individuals to do extensive internships in educational leadership. The effectiveness of aspiring principal programs that are used to recruit teachers into administration was also explained in the literature. Aspiring principal programs have been conducted in Montana with joint effort from university preparation programs and state associations for elementary and secondary school principals. The literature was also clear about the effectiveness of establishing formal recruitment strategies and mentoring programs for principals. School districts in Montana generally do not have formal recruitment procedures or mentoring programs for new principals.

However, the Montana Association for School Superintendents does have a mentoring program for new superintendents.

Perhaps, as some researchers concluded, one of the most effective ways to make the school leader's position more attractive would be to restructure the job. Currently, some school districts in the nation are experimenting with co-principalships, while others, even in small school districts in Montana, are sharing superintendents.

Many states are shifting the power from the state to local communities to make hiring decisions of their school leaders. In Montana the local school board has the ultimate responsibility to "employ or dismiss a teacher, principal, or other assistant upon the recommendation of the district superintendent, the county high school principal, or other principal as the board considers necessary, accepting or rejecting any recommendation as the trustees in their sole discretion determine. . . .(MCA 20-3-324) (School laws of Montana, 2000). Under state law, principals can be granted tenure, but tenure does not exist in state law for superintendents.

III. Education and Professional Learning

The State Action for Education Leadership Project recognizes that one of the most important state strategies for assuring the quality of educational leaders is the setting of requirements for individual licensure and preparation programs. There must be alignment between standards of preparation programs and licensure requirements. Also important is the assurance that practicing school administrators receive effective training in order to meet the complexities of the practice. Continuous training of current and new school administrators and additional strategies for professional development are important since these leaders are being held more accountable for advancing all students to high academic standards. Educational leaders must also balance management duties with leadership to improve teaching and learning in their schools.

Preservice Education

A comprehensive study of original documents from state departments of all 50 states regarding approximately 40 characteristics of preparation programs requirements for both principals and superintendents produced several disturbing findings (Overbeck & Ellis, 1999). These findings have implications for the preparation and licensure of future administrators.

1. Although 88% of the 50 states revised their certification/licensure requirements in the ten years studied (1986-1996), virtually no relationship was found between the new requirements and the recommendations from the literature.
2. During 1986-1996 certification/licensure requirements in most of the 50 states have changed little compared to previous periods.
3. Few states have certification/licensure requirements that reflect changes called for in the leadership literature for superintendent preparation.
4. In most states there is little to distinguish requirements for superintendent preparation from those for principal preparation.

In the most recent ten year national study of superintendents, key areas of primary concern were identified for preparation programs in educational leadership (Glass et al., 2000). Those areas were testing and accountability, public relations, assessing educational outcomes, and administrator/board relations. Interestingly, Glass noted that the current literature on administrator preparation quality is almost universally negative. However, he explains in the most recent survey, superintendents generally believe their preparation programs were “good”. A third thought them to be “fair

or poor". In fact, Glass states that over the last 20 years nearly three-quarters of superintendents consistently evaluated their graduate programs as either "excellent" or "good".

Glass continues to explain that several conditions contribute to a school leader's view of their preparation program in educational leadership. Some of these problems are a result in constraints on individuals which force them to enter their preparation programs as a part-time instead of full-time basis. Other problems come from school districts who are unwilling or unable to support the development of leaders by financial assistance, paid sabbaticals, and opportunities to work with exemplary school leaders.

The National Institute on Education Governance, Finance, Policymaking, and Management recently published a booklet exploring the major issues involved in creating effective leadership for today's schools (1999). Their suggestion on how to improve preparation programs for school leaders is to provide individuals with opportunities for leading. "People learn leadership by actually leading—and by having simultaneous opportunities to reflect on what they are doing, and to talk about the process with others". They also recommend incorporating more classroom teaching experiences into training programs. Agreeing with conclusions made by Glass above, the Institute explains that it is a less than ideal situation when candidates pursue degrees through part-time study and pay for it themselves. Instead, they should be provided with stipends and release time so they can truly focus on learning. The Institute furthermore suggests that states eliminate those university leadership preparation programs that are not effective.

The National Association of State Boards of Education Study Group on school leadership (1999) made recommendations for effective principal preparation programs. Effective programs are those that:

1. **are competitive** with highly motivated and intellectually strong candidates who have been screened and are committed to school leadership prior to beginning the program.
2. **develop philosophical and intellectual perspectives** on the school system by analyzing their experiences in the context of theoretical and philosophical paradigms.
3. **bridge the gap between theory and practice** through field-based experiences and reflection.
4. **implement innovative course schedules** with classes held on weekends, during the summer, and paired with internships during the work day.
5. **develop principals who go where they are needed**.
6. **forge partnerships with school districts**.

7. **insist on rigorous internships** with time for reflection among peers in the preparation program.

A study asked K-12 principals questions about their perceived roles, time spent on those roles, and their graduate school preparation (Graham, 1997). Findings indicate that the typical respondent spent 46-60 hours a week dealing with primarily "administrivia", and a significant amount of time supervising students and faculty, attending meetings, and dealing with discipline situations. However, they spent little time in the role of instructional leaders for which their graduate programs had prepared them. Respondents also reported that topics of class scheduling and discipline were missing in their preparation.

Appendix B contains *Proficiencies for Principals* from the National Association of Elementary School Principals, and *Skills for Principals* from the National Association of Secondary School Principals.

Educational Leadership Internships

The administrator internship program provides individuals with on-the-job experiences that researchers view as essential to learning educational leadership skills (Council of Chief State School Officers, 1996; National Institute on Education Governance, Finance, Policymaking, and Management, 1999; Yerks & Guaglianone, 1998). The establishment of a mentoring relationship is vital to the success of the internship. A first year evaluation of the Principal's Center at Texas A&M University revealed the importance of including training opportunities, such as effective mentoring for personal professional growth and campus-leadership development (Erlandson & Zellner 1997). Participants in the Principal's Center work as assistant principals and attend monthly seminars, retreats, and campus visits, keep reflective journals, and use technology to help in their training and mentoring throughout the year.

In North Carolina, the state mandated that changes be made in principal preparation programs and funded a program for Principal Fellows. Participants in this program receive loans for a full-time, two year program toward initial administrator licensure. A study of one university's program under that mandate found that participants of the full-time extended internship were very satis-

fied with the experiences they gained, and were better prepared for entry-level administrative positions than their part-time counterparts (Bradshaw, L. et al., 1997).

Administrator Preparation Programs in Montana

Master's and Doctorate degrees are available in educational leadership from the University of Montana in Missoula, and Montana State University in Bozeman. At Montana State University—Bozeman students take classes in educational leadership, research, and instructional leadership. A field experience, or internship, is required for all students. Field experience is individualized and "offers students the opportunity for guided field experience as a principal or superintendent in primarily K-12 educational agencies. This course [is] included [in] the Office of Public Instruction (OPI) Intern Program as well as the Educational Leadership practicum" (Montana State University, Department of Education, Educational Leadership Program, 2001). Students at the University of Montana take graduate coursework in law, curriculum, supervision, technology, site-based management, finance, and futures (University of Montana, Department of Educational Leadership, 2001). Field experience is not required at the University of Montana. However, OPI internships are offered at both universities. Professional educator preparation program standards and procedures for accreditation of school leaders for Montana are provided in Appendix A.

School board chairs surveyed in the state indicated that the superintendents with whom they had worked in the last three years were well prepared in the areas of finance/budget and curriculum, were adequately prepared in labor relations/collective bargaining and technology, and not prepared in the areas of community relations and leadership/change strategies (Montana School Boards Association, 1999). Superintendents surveyed indicated principals with whom they had worked in the last three years were well prepared in student management/discipline and curriculum, were adequately prepared in staff relations and conflict management, and were not prepared in facilities planning and management and finance/budget.

In the same study, most of the superintendents (43%) indicated they felt they were extremely or well prepared in school administration, or they were adequately prepared (42%). Principals most often indicated they were extremely or well prepared (48%), or adequately prepared (42%).

State Examples of Preservice Education for Educational Leaders

In North Carolina, where the state mandated changes in educational leadership preparation programs, each university in the state with such programs was required to submit proposals to reform their programs. The number of programs declined from 12 to 7 (National Institute on Educational Governance, Finance, Policymaking, and Management, 1999).

California's Commission on Teacher Credentialing adopted new standards for administrator preparation. The new features of the program are induction, curriculum, mentoring, and candidate-assessment, and are designed for beginning administrators. An evaluative study of the program found that almost all candidates were satisfied with the curriculum and induction aspects of the program, but the mentoring support from the candidates' school districts was inadequate (Kim, L., 1997).

In Kentucky individuals seeking to become a principal or superintendent must complete a mandatory "training and assessment process, as part of the statewide professional development program (Council of Chief State School Officers, 2001). In fact, the state has established programs and facilities that are specifically designed to prepare and assess entry-level principals and superintendents. Preparation consists of an exam and formal training. Before individuals are accepted to become a principal they must first complete a formal evaluation and application process. They must also successfully complete the National Association of Secondary School Principals' (NASSP) examination and meet any additional relevant eligibility and selection requirements. The NASSP assessment is performance-based. In *Superintendents' Training Program and Assessment Centers* candidates receive training in core concepts of management, school-based decision making, Kentucky school law and finance, and school curriculum and assessment.

In Mississippi every principal and superintendent is required to complete a mandatory two-year, entry-level administrator training program (Council of Chief State School Officers, 2001). Furthermore, individuals must perform a variety of additional leadership and professional development training. *School Executive Management Institutes* and six state approved university administrator training programs provide these training opportunities. The state also offers principals the op-

tion of involvement in the *Beginning Principal Support Program*, which offers on-going support to eligible beginning principals. This support is given through formally assigned mentor principals throughout the first full year of employment. The university administrator training programs are grounded in the Interstate School Leaders Licensure Consortium's (ISSLC) Standards for School Leaders. This training consists of theme-based curriculum, problem-based instruction, team-teaching instruction, field experiences/internships, and performance-based assessments.

The Missouri Department of Elementary and Secondary Education assesses individuals interested in receiving a school administrator certificate (Council of Chief State School Officers, 2001). The emphasis in assessment has recently shifted from management skills to leadership for teaching and learning as a result of the adoption of ISSLC Standards.

For certification in Ohio every teacher and principal must complete a one-year preservice training program called *Entry Year Program* (Council of Chief State School Officers, 2001). This involves a formal program of support, including a mentoring component, along with a performance assessment. The program is based on the ISSLC Standards, and is focused on leadership for teaching and learning. The *Ohio Principal's Academy* administers the program.

The Washington state legislature recently allocated $125,000 to train assessors/mentors in order to provide new principals with assessment of performance-based leadership skills, development of a professional growth plan, and mentoring (Council of Chief State School Officers, 2001). The program is called the *Principal Leadership Development Program*, and is based on the ISSLC Standards.

Continuous Professional Learning

The professional development needs of school leaders have been ignored or undervalued for far too long (Shipman, Topps, & Murphy, 1998). In the past two decades school leaders have faced many changes. A few of those changes have been in student standards and outcomes, a collaborative leadership model, broader community involvement, off-campus learning sites, new instructional techniques, data-based decision making, and technology.

As a result, best practice for professional development for school leaders, according to Mann (1998), is quite different from what has traditionally been done. Most often, school leaders are disappointed with the relevance and impact of inservice programs. This inservice has traditionally been periodic, remedial, skills transferred from "experts" to school leaders who sit and listen, seen as a luxury and not essential, and too time and resource consuming. Instead, best practice for professional development for school leaders should be ongoing if it is to result in significant change. This change is the result of individual and organizational development. The goal of professional development should be to support inquiry into and study of teaching and learning. School leaders learn as a result of training, practice, feedback, as well as individual reflection and group inquiry into their practice. Professional development should be seen as vital to school development, primarily school-focused, and embedded in the job. The change in best practice for professional development is a result of the changing context of education that creates a need for a different type of school leadership, where leaders can put into practice the educational theories of teaching and learning.

One example of meaningful professional development is taking place between a school district and university. Campbell Union School District in California has teamed up with San Jose State University to develop a seamless continuum of professional development opportunities and structures that extends from teacher education at the university to new teacher training and support at the school district (Chartrand, Moore, & Laurie-Markowitz, 2000). The program also focuses on building leadership skills in all teachers.

A longitudinal study of the professional development needs of principals, began in 1994, found that their greatest needs are in the area of instruction (Erlandson, 2000). Parent relationships and personal relationships in the school also were high priorities. On the whole these principals gave little priority to their own learning. Meeting legal requirements, along with building and maintaining organization control were also high priorities.

Previously, the benefits of mentoring for new principals and superintendents were discussed. Mentoring can also be an important part of professional development for all school leaders. Principals and superintendents often face loneliness and isolation in their jobs. Mentoring can reduce this

by providing opportunities to reflect on, articulate, and better understand current trends and practices in education (London & Sinicki, 1999). The authors recommend the adoption of a peer-coaching model for principals and superintendents. Better decisions can be made by discussing these issues, and principals can better anticipate the results their actions can have.

The Interstate School Leaders Licensure Consortium (ISLLC), a program of the Council of Chief State School Officers, has linked their standards to professional development. The standards are being used by universities to design administrator training programs and by states in their policies for licensure and certification of school administrators. Newly developed licensure assessments designed by the Educational Testing Service for ISSLC Standards are performance-based. Integral with this assessment is the development of a portfolio. The portfolio provides evidence of the practitioner's involvement in school and/or district improvement efforts centered on advancing student achievement, and offer evidence of the practitioner's sustained involvement in professional development activities (Shipman et al., 1998). The six components of the portfolio are: (1) facilitating the vision of learning within the school community; (2) sustaining a culture conducive to student learning; (3) understanding and responding to the larger context; (4) collaborating with families and community; (5) supporting professional growth and development; and (6) organizing resources for an effective learning environment (Work in progress, 1999).

Assessment of School Leaders

Performance standards seem to be the focus of most reform efforts of the last 15 years (Lashway, 1998). Accordingly, performance standards for students are resulting in new expectations for educators. Groups such as the American Association of School Administrators, the National Association of Elementary School Principals, the National Association of Secondary School Principals, and the National Policy Board for Educational Administration have proposed standards for school leaders. The drive is to link performance of principals to standards. Professional development should focus on these standards. However, current administrative evaluation procedures are seldom aligned to standards.

Other authors believe that these standards ignore the diverse contextual realities in which an educational leader functions (Wallace et al., 1999). Focusing on discrete tasks or prescriptive checklists becomes restrictive and loses more information than it obtains. They believe such an act limits the opportunity to observe other dynamic processes, indicative in the creative nature of outstanding leadership. An "open systems framework" is advocated that allows observation of the whole system rather than focus on discrete tasks. More information on assessment of school leaders is found in the topic, V. Conditions for Professional Practice.

State Examples of Professional Development for School Leaders

In California, the Governor's Principal Leadership Institute and the California School Leadership Academy (CSLA) offer professional development training programs on an on-going basis (Council of Chief State School Officers, 2001). These programs are funded by the state legislature. The CSLA has recently consisted of three programs: (1) *Foundations II* which promotes instructional leadership and curriculum in K-12 schools; (2) *School Leadership Teams*, intended to develop communities of leaders made up of principals, parents, and teachers; and (3) *Ventures*, a performance-based approach to school leadership. In addition to these three programs the CSLA offers the Executive Leadership Center for superintendents that focuses on knowledge, action, and leadership. Currently the Professional Development Task Force, formed in 2000, is finalizing its report of recommendations.

A statewide network of professional development academies is currently being established throughout Florida (Council of Chief State School Officers, 2001). School districts will be able to purchase high-quality training programs from these academies, which are operated in partnership with local businesses.

In 1985 the Indiana legislature established the Indiana Principal Leadership Academy (Council of Chief State School Officers, 2001). It provides a wide range of services for educators including: 18 days of professional development program over a two year period; a Summer Intensive Session for School-Based Teams; an Annual Winter Conference for alumni of the academy; Think Tanks; a resource database; linkages between professional associations, the State Department

of Education, business, and higher education; publications; a resource video library; and a web site (www.doe.state.in.us/ipla).

Under legislative mandate, the state of Kentucky has established a statewide continuous professional learning program to improve instruction and leadership in public schools (Council of Chief State School Officers, 2001). Each local school district superintendent must appoint a certified school employee to fulfill the role and responsibilities of a *professional development coordinator*. This person is required to participate in an annual training program, and must then distribute the information to his/her school district. Additionally, all instructional leaders in the state must attend *the Kentucky Effective Instructional Leader Improvement Program* in order to maintain their certification. All superintendents are required to attend the *Superintendent Training Program* at *Assessment Centers*. An optional professional development program the state has available is the *Kentucky Leadership Academy*, focused on structured study, practice, and coaching. Registration fees are covered by school districts. The Principals of Excellence Network allows some of Kentucky's most effective and successful principals to share initiatives and leadership strategies. Lastly, each school district in the state is responsible for annually developing a process for professional development.

In 1985 the Missouri legislature established the *Principal Administrator Academy,* now known as *The Leadership Academy* (Council of Chief State School Officers, 2001). This academy is an organizational framework consisting of a variety of educational and training programs for school leaders. The state also set up beginning teacher assistance through a formal mentoring program. The *Outstanding Schools Act* of 1993 required 1% of each school district's basic foundation be allocated for establishing an on-going plan of professional development for school staff. Professional development activities are now aligned with the ISSLC Standards. *Regional Professional Development Centers* have been established to provide focused professional development tailored to specific school needs. These centers are part of *The Leadership Academy*. The academy has formed partnerships with higher education and private foundations.

Funds for regional training programs for professional development have been set aside by the Nevada legislature (Council of Chief State School Officers, 2001). Four regional centers are

being established in four school districts across the state. All 17 school districts in the state will be served by the 4 regional training centers.

Professional Learning for Montana School Leaders

A minimum of three days of professional development must be provided to each certified employee for continuous instructional and administrative improvement in order to meet accreditation standards (Office of Public Instruction, 2001). State statutes provide state funding for up to seven additional pupil-instruction-related days. Two of those days must be allocated for time to attend the October professional educator's conferences, and at least one more day must be dedicated to professional development activities of the staff. No incentives currently exist for school districts to provide more than three days of professional development. Certified staff must provide evidence of professional development activities in order to renew their certificates.

Specifically, in order to renew administrative certificates (Class 3) candidates must verify one year of successful experience, or the equivalent, in the area of endorsement, plus presentation of acceptable evidence of 60 renewal units, both earned during the valid term of the certificate (Office of Public Instruction, 1999). See Appendix C for a complete listing of requirements for Class 3 administrative certification.

The School Administrators of Montana (SAM) is an umbrella organization with five affiliates. The organization is made up of approximately 800 members, showing a high participation rate (Sykes, assistant director, personal communication, July, 2001). Affiliates serve groups of school superintendents, county superintendents, elementary/middle school principals, secondary school principals, and special education directors. Different conferences are held for each group individually throughout the year. Additionally, all groups meet in October for the Montana Conference on Educational Leadership, in association with the school boards association and the school business officials. Topics at these conferences are designed around the professional development needs of the groups' members. Typically, professional development topics focus on management issues.

The Montana Association for School Superintendents has a mentor program for new superintendents. New superintendents are identified as a person moving from a principalship into a su-

perintendency, or a superintendent from out of state moving into a superintendency in Montana. These new superintendents are assigned a mentor to work with them during their first year. The School Administrators of Montana offers a workshop in August for new superintendents and principals. Topics at the most recent "New Leaders' Workshop" held August 1-2, 2001, were school law, legislation update, school finance, and contract negotiations. The association also provides information for its members through a list serve for those who are interested.

Recently the Bill and Melinda Gates Foundation awarded money to the University of Montana, Montana State University, and the School Administrators of Montana. Through one component of the grant courses will be offered, information provided, contacts with software and product companies provided, reviews and articles presented, forums conducted around key concerns, exemplary ideas and programs presented, and technical assistance provided. All this will be accomplished through a web site set up at the University of Montana and maintained by the educational leadership group. Through another component of the grant, Montana State University in Bozeman will continue to offer annual leadership academies. Two academies have already been held. Additional regional workshops will be offered by the Burns Telecommunications Center at Montana State University in Bozeman, and will be based on regional technology needs of school leaders. A summer workshop will be offered at the University of Montana and a distinguished scholar in the field of leadership and technology will present.

Recommendations

The National Association of State Boards of Education's (1999) report of their Study Group on School Leadership recommends the following options be considered by state policy makers in order to build a foundation for quality through principal preparation and professional development:

- Include in the state's system of standards clear expectations for the outcomes of preparation and professional development programs.
- Allow diverse routes for leader preparation as long as they adhere to the same high standards as traditional preparation programs.
- Ensure that all new leaders have access to high-quality induction that includes mentorship.
- Base leaders' professional development upon the results of individual formative and summative evaluation that is based upon state standards and clearly defines the targeted educational needs of individual leaders.

- Evaluate systems of preparation and professional development to ensure they help leaders meet state standards.

Comparison of Best Practice to Current Practice in Montana

The Council of Chief State School Officials recommends there be alignment between standards of preparation programs for educational leadership and licensure requirements. And since school leaders are being held more accountable, particularly for increased student achievement, they should receive extensive professional development opportunities to help them meet the demands of the profession. Professional development for school leaders must be a balance of both management and leadership skills.

Over the last 20 years, Glass (2000) noted that 75% of the superintendents surveyed in a national study consistently evaluated their preparation programs as either "excellent" or "good".

In Montana, school board chairs surveyed indicated that the superintendents with whom they had worked in the last three years were well prepared in the areas of finance/budget and curriculum, were adequately prepared in labor relations/collective bargaining and technology, and not prepared in the areas of community relations and leadership/change strategies (Montana School Boards Association, 1999). Superintendents surveyed indicated principals with whom they had worked in the last three years were well prepared in student management/ discipline and curriculum, were adequately prepared in staff relations and conflict management, and were not prepared in facilities planning and management and finance/budget. Most of the superintendents indicated that they were extremely or well prepared (43%) in school administration, or they were adequately prepared (42%). Principals most often indicated they were extremely or well prepared (48%), or adequately prepared (42%).

The literature explained the importance of the internship experience in the effectiveness of a preparation program for school leaders. It provides individuals with on the job experiences that researchers view as essential to learning leadership skills. Through this experience, a mentoring relationship is also established. The educational leadership program at Montana State University (MSU) in Bozeman includes an internship, or field experience, for students aspiring to the principalship or superintendency. MSU field experience is an individualized course that offers students the

opportunity for guided field experience as a principal or superintendent in primarily K-12 educational agencies. The course is also included in the Office of Public Instruction (Office of Public Instruction) internship program and is offered at both the University of Montana and Montana State University.

Traditionally, the professional development needs of school leaders have been ignored. In-service has been periodic, remedial, skills transferred from "experts" to school leaders who sit and listen, seen as a luxury and not essential by school districts, and too time and resource consuming. But in order for school leaders to meet the increasing demands for accountability in education, they need to be given extensive opportunities to learn and increase their skills. Professional development for school leaders should be ongoing if it is to result in significant change, and be embedded in individual and organizational development. It should support inquiry into and study of teaching and learning. School leaders learn as a result of training, practice, feedback, as well as individual reflection and group inquiry into their practice. Professional development for school leaders should be primarily school-focused, and embedded in the job.

In some locations, collaborations have been forged between universities and school districts in designing and delivering professional development opportunities. Mentoring is another approach used by school districts for professional development (London & Sinicki, 1999). Mentoring reduced isolation felt by many school leaders, and provided opportunities to reflect on, articulate, and better understand current trends and practices in education.

Professional development opportunities for school leaders vary from school district to school district in the state. A minimum of three days of professional development must be provided to each certified employee for continuous instructional and administrative improvement in order to meet accreditation standards (Office of Public Instruction, 2001). State statutes provide state funding for up to seven additional pupil-instruction-related days. Two of those days must be allocated for time to attend the October professional educator's conferences, and at least one more day must be dedicated to professional development activities of the staff. No incentives currently exist for school districts

to provide more than three days of professional development. Certified staff must provide evidence of professional development activities in order to renew their certificates.

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based on regional technology needs of school leaders. A summer workshop will be offered at the University of Montana and a distinguished scholar in the field of leadership and technology will present.

IV. Licensure, Certification, and Program Accreditation

States use licensure, certification, and accreditation requirements as levers to set the expectations for educational leadership practice. The State Action for Education Leadership Project focuses school leadership on improving teaching and learning, and believes that licensure must require this focus and frame the preparation necessary to accomplish the goal. The Interstate School Leaders Licensure Consortium (ISLLC) project, which also focuses on leadership for teaching and learning, has developed standards for school administrators. These standards have been adopted by more than 30 states in development of new licensure standards and requirements (see Figure 1 and Appendix A).

Several states are also reshaping preparation programs for educational leadership by insisting on relevant, high quality training be provided to produce effective school leaders. They are working to alter educational leadership preparation training programs by insisting that more rigorous, diverse, and better grounded training in the everyday setting of teaching and learning in public schools. Some states are considering alternative backgrounds to licensure with preparation in the fields of business and management. States can regulate the quality and quantity of such programs by controlling accreditation status and funding.

Current Practice in Certification and Licensure

Most states require a master's degree in educational leadership for administrator licensure (Glass et al., 2000). Additionally, many states require graduate level coursework, professional development, internship experience, and inservice training in order to maintain administrator licensure. Trevisan (1999) found in a study of certification offices in the United States that 18 states requires some form of student assessment knowledge and skills for school administrators. Findings suggest that the nation may be producing administrators deficient in the student assessment skills needed to meet professional responsibilities. This could be especially important with the current emphasis on student achievement scores and its relationship to school, teacher, and administrator effectiveness.

State Examples of Licensure and Certification Requirements for Principals and Superintendents

The push for accountability in education has lead many states to adopt competency-based assessment practices to determine licensure for school administrators. Minnesota is one such state (Werner, 2000). Here the determination of readiness for administrator licensure is not the sole responsibility of the university preparation program. It is now shared by the university, licensed administrators from the field, and school board members.

Minnesota also abolished separate licenses for elementary and secondary principals, and instead issues a K-12 principal license. The state requires three years of teaching for principals and superintendents, but does have a special clause for administrative licensure without teaching experience. The applicant is required to complete one year of classroom experience, with the university determining what experiences will be accepted. There is also a clause that allows for superintendents with no teaching experience to become licensed. Here the applicant is required to demonstrate "substantive experience and education in administration, supervision, management, and executive leadership, in either education, health care business or industry, labor or government".

An *Alternative Route to Administrator Certification* program in Illinois allows eligible individuals to receive standard certification to practice as a superintendent (Council of Chief State School Officers, 2001). Eligible applicants must have graduated from an accredited college or university with a master's degree in a management field, or with a bachelor's degree and the life experience equivalent of a master's degree in such field, have been employed for at least five years in a management level position, and have successfully completed the first phase of the *Alternative Route to Administrative Certification* program along with passing any examination required by the State Board of Education.

In Delaware the state board of education adopted statewide practitioner requirements based on school administrator standards in 1997-1998 (Council of Chief State School Officers, 2001). The standards are compatible with two existing sets of national standards for school administrators—Standards for School Leaders (ISSLC) and Curriculum Guidelines for Advanced Programs in Educational Leadership, approved by the National Council for the Accreditation of Teacher Education (NCATE). Performance indicators are designed to measure applicant competency. Along with

impacting administrator licensure the standards also apply to professional development and re-certification activities, performance appraisal processes, and in accreditation of university training programs for school leaders.

The ISSLC Standards also form the basis for principals in Maryland seeking to become licensed (Council of Chief State School Officers, 2001). Applicants for principals and superintendents must fulfill a series of formal, technical requirements. In Wisconsin, all categories of licenses for school leaders are derived from the ISSLC Standards and are performance-based.

An independent *Professional Standards Board for School Administrators* in North Carolina controls certification for new administrators (Council of Chief State School Officers, 2001). Applicants interested in becoming school administrators must submit a written application and pass the *North Carolina Public School Administrator's Exam.*

West Virginia promotes the mobility of educators across state and national lines with a cross-state contract designed to make it easier for teachers and school leaders to move across state boundaries and still practice (Council of Chief State School Officers, 2001).

In the northwest region, made up of Alaska, Washington, Idaho, Montana, and Oregon, all but one of the states require the appropriate administration certification for superintendents (Wolverton, Rawls, & Macdonald, 2000). In Washington, certification is optional but may be required at the request of the employing school district. Credentials are typically earned at local universities, who attest to the competency of individuals who complete a program of study. Following this the State Board of Education, a state Commission, and/or the Superintendent of Public Instruction of the state grants the certification.

Along with completing credentials at a university program, applicants are required to have experiences in public schools. Experience ranges from 3 to 5 years, depending on the state. At least one of those years must include administrative experience. Oregon and Washington also require evidence of good moral character and personal fitness. Oregon's Initial Superintendent License requires one year of experience at the district level while working with a mentor. Additional education components are required by some states. Applicants for certification in Alaska must complete three

semester hours in Alaska studies and multicultural education or cross-cultural communication. Washington superintendents must complete coursework that deals with issues of physical, emotional, sexual or substance abuse in order to obtain certification.

Montana Certification Requirements and Alternative Certification for School Leaders

Individuals seeking certification in school administration in Montana must complete a master's degree as either a member of a cohort, as an individual, or as part of the Office of Public Instruction (OPI) internship program. Principals can be certified grades K-8, 5-12, or K-12. Additional course work is required for superintendent certification. School administrator preparation programs vary by institution. Montana State University in Bozeman requires an internship experience, while at the University of Montana in Missoula an internship experience is optional. However, both the University of Montana and Montana State University offer internship experience for OPI interns (explained below). Additionally, the state may grant a provisional administrator certification, with expectations that individuals will meet standards for certification within a given time period.

An alternative route to administrative certification is the OPI internship. School districts approved for the program employ the OPI intern as a part-time or full-time administrator. An official contract exists between the school district, intern, a supervising university, and OPI. Prior to being admitted into the intern program, the candidate must be admitted into an approved university preparation program and have completed at least eight semester credits before beginning the first intern academic year. Three years is given to the intern to complete the program and receive appropriate administrative certification. The sponsoring school district provides funds for university tuition, university supervision, professional dues and expenses, and agrees to employ the intern for up to three years based on satisfactory job performance. The sponsoring school district must assign an on-site administrator to act as mentor for the intern.

A recent study focused on the Montana OPI intern program (Stout, 2001). OPI interns and regular administrative interns enrolled in university programs were questioned as to perceptions of their administrative skill. Their mentors were also questioned. No significant difference was found between mentor and interns in the OPI and regular program on their perceptions of administrative

skill competency. This finding shows that the OPI internship program is just as effective in preparing school administrators in administrative skills as regular internships do at the university. Mentors rated themselves much more effective than did their interns in the areas of relationship, information, and facilitation. The researcher recommended that mentors should receive training before supervising an administrative intern, since a large number of interns in the study felt their mentors were not effective.

The majority of school board chairs (64%) and superintendents (75%) surveyed favor expansion of the OPI internship program in order to help with administrative shortages (Montana School Boards Association, 1999).

Currently a committee from the Certification Standards and Practices Advisory Council of the Montana Board of Public Education is working on revising Chapter 57 of the Montana Code that specifies certification requirements for principals and superintendents (Rogers, OPI Director of Accreditation, personal communication, July 6, 2001). This will be the first comprehensive review of the these rules since it 1972. The committee will also review licensure renewal for school leaders.

Barriers to Those Seeking Certification in Montana. Administrators who hold certificates from other states often cannot receive certification in Montana. According to Rogers, restrictions were established years ago when there was an abundant supply of school administrators in Montana. It is his belief that this policy contributes to the shortage of administrators the state is currently facing, and will face to a greater extent in the future.

Accreditation Requirements for School Leader Preparation Programs

State Examples

Each school administrator preparation program in Iowa must be approved by the State Board of Education (Council of Chief State School Officers, 2001). Each program files proof of how it meets the state standards in key strategy areas in their *Institutional Report*. After this a team visits the site and conducts a program evaluation. The same is true in Mississippi where a *Commission on Teacher and Administrator Education, Certification, Licensure, and Development* recommends ap-

proval or disapproval for all educator preparation programs each year. School administrator preparation programs are based on the ISSLC Standards. Similarly, all preparation programs in the state of Washington must submit an annual report to the state board of education. Each preparation program uses performance-based accountability measures.

In North Carolina the state has limited the amount of preparation programs for school administrators to nine sites. These sites compete for accreditation through the *Board of Governors of the University of North Carolina*. Preparation sites were limited in order to improve the quality of administrator preparation and to bring the supply of students entering programs into balance with district requirements and needs.

In West Virginia a *framework* governs the development, implementation, and approval of educational leadership programs (Council of Chief State School Officers, 2001). Criteria for program implementation, assessment instruments and procedures, and minimum proficiency levels are established for state-adopted instruments using the framework.

Comparison of Best Practice to Current Practice in Montana

Most states require a master's degree in educational leadership for certification. Graduate level coursework, professional development, internship experience, and inservice training are often required by many states for recertification. Many states have adopted competency-based assessment practices to determine licensure of school administrators. The ISSLC Standards have been used in competency-based assessments.

School leaders in Montana obtain certification by receiving a master's degree in educational leadership from an accredited college. Principals can be certified K-8, 5-12, or K-12. Additional coursework is required for superintendent certification. A provisional certificate is granted with expectations that individuals will meet standards for certification within a given time period. The Office of Public Instruction does offer an alternate route to administrative certification with their OPI Internship Program. Here, the intern is employed as a part-time or full-time administrator while continuing to work on certification. Principals and superintendents receive a Class III certification. Requirements to renew this certification are one year of successful experience, or the equivalent, in

the area of endorsement, plus presentation of acceptable evidence of 60 renewal units, both earned during the valid term of the certificate (Office of Public Instruction, 1999). See Appendix C for a complete listing of requirements for Class 3 administrative certification.

Currently, a committee from the Certification Standards and Practices Advisory Council of the Montana Board of Pubic Education is meeting to revise Chapter 57 of the Montana Code that specifies certification requirements for educators.

Many preparation programs in the nation have used the ISSLC Standards in curriculum development. The standards have also been used to assess school leader competency upon completion of preparation programs. The ISSLC Standards have been used in development of the educational leadership program at Montana State University in Bozeman. The Montana Board of Public Education (2000) has issued professional educator preparation program standards for the state's university system. These can be read in Appendix A. The state standards were based on the NCATE standards (National Council for Accreditation of Teacher Education). However, the two are not fully aligned. New NCATE standards being drafted appear to mirror current ISSLC standards.

V. Conditions of Professional Practice

Many states set policy for terms and conditions of professional practice for school leaders. "States may create, authorize, and finance local and state contracting and bargaining policies, salary and pensions programs, performance review procedures and criteria, and incentives or sanctions for exemplary or unsatisfactory performance of school leaders" (Council of Chief State School Officers, 2001). The profession of educational leadership is being impacted by the shortage of school leaders, the attention on increased school accountability with rewards and sanctions related to school leader performance, and the push to have school leaders perform more competitively as business leaders do. Issues of salary, rewards, incentives or bonus programs, contracting and hiring practices, retirement conditions, and performance reviews are related to this topic. These changes are increasing attention to the exercise of state authority to change terms and conditions of practice.

Incentives: Salary, Pension, Bonuses, Merit Performances

Schroeder and Nelson (1997) have found that many new concepts in the field of personnel compensation are emerging that warrant further study. However, they warn that these new concepts must be examined in the light of the failure of merit pay programs. Most merit pay programs were "poorly designed and implemented and caused serious morale problems. In many cases they were mandated, divisive, competitive and poorly funded. They have tended to promote distrust, self-centered behavior, and isolation of teachers, as opposed to collegiality, teamwork and sharing of good ideas". In fact, the authors explain that merit pay programs have not been as successful in public or private sectors as originally thought.

The concept of "new pay" is gaining interests and includes the following ideas: (a) *group incentives*; (b) *voluntary participation*; (c) *collaborative design*; (d) *skill based pay*; (e) *incentive or bonus pay*, a one time award for extraordinary accomplishment by an individual or team; (f) *licensure pay*; (g) *market pay*, which allows districts to differentially pay teachers in shortage areas and often not related to years of experience; (h) *knowledge pay*; (i) *gainsharing*, a bonus program designed to reduce administrative costs where the savings are passed on to group members; (j) *job enrichment*, differentiating the duties and responsibilities by adding more variety and growth opportu-

nities; (k) *market analysis*, where salary ranges are based on systematic data collection from comparable organizations; (l) *pay for performance*; (m) *new pay*, which focuses on people, skills, knowledge and performances and not jobs; and (n) *variable pay*, which rewards employees for performance when the organization is successful.

In the 1998 national study of K-8 principals nearly nine out of ten had some type of written document that specified salary, benefits, and working conditions (Doud & Keller, 1998). The data from the survey indicated a trend of a steadily lengthening work year for principals who indicated their contract was for 214 days.

In 1997-1998 the School Administrators of Montana surveyed school district administrative personnel in the state regarding their salaries. This is the latest study available. Data from the study yielded mean salaries for superintendents and principals. These salaries were also compared to both a regional and national mean. All salaries were significantly below both regional and national means (See Figure 3).

Figure 3. Comparison of 1996-97 School Administrator Salaries.

Job Title	**1997 Montana mean salary**	**1996 Rocky Mountain Region mean salary**	**1996 National mean salary**
Superintendent	$54,797	$78,613	$98,106
High School Principal	$49,378	$56,215	$69,877
Elementary Principal	$48,658	$49,222	$58,221

Retirement

States can enrich their own pool of potential candidates for school leaders by enhancing portability between other states *(Leadership for student learning: Reinventing the principalship*, 2000). This reworking of retirement and retention programs could increase school leaders' freedom to move across state boundaries without sacrificing benefits. It could also encourage effective leaders to remain on the job. In New York, recent legislative changes allow districts that are typically declared "shortage areas" to rehire retirees without affecting their pensions (The National Association of State Boards of Education, 1999). Louisiana also implemented an effective incentive to reduce

retirement rates without affecting the retirement benefits of principals because of the predictions of principal shortages.

Most states have early retirement programs that begin at age 55. In the latest of national studies of superintendents (Glass et al., 2000) data revealed that half of the superintendents are over the age of 50, and most retire between the ages of 57 and 60. Of those, 8 to 10% could retire early and another 20% could look for new districts with larger enrollments, greater wealth, and higher salaries within the next 10 years.

A study of 1,180 superintendents in the northwest United States found that 33% of them plan to retire within the next four years, and 10% of those superintendents who will retire from their current state system will not be applying for another superintendency (Wolverton et al., 2000). Within the northwest region there are states that penalize employees who stay within the system past a predetermined amount of time. The belief behind such policies is that new, younger people will be brought into the job market at a lower cost to the state. For this to happen there needs to be qualified people available to step into these vacant positions. The study found that highly qualified superintendents retire out of one state and move into another because they are marketable. This is good for the state that can attract these superintendents, but leaves a void in filling superintendent positions in other states.

In a recent study of Montana superintendents (Wolverton et al., 2000) 28% surveyed plan to retire in four years, while 35% plan to apply for a superintendency in the next four years. Superintendents who responded to a Montana School Boards Association study (1999) indicated that 50% of them plan on retiring from their jobs within the next five years. Another 22% will retire within 6 to 10 years. Of principals surveyed, 26% indicated they plan on retiring within the next five years. Another 35% plan on retiring within 6 to 10 years. Superintendents and principals most often indicated that after retirement they will take a similar job out of state or take a job in the private sector.

One of the biggest disincentives for school leaders in Montana is the lack of retirement portability. In a study of these individuals, superintendents and principals agreed that improved retire-

ment benefits would encourage them to remain in school administration (Montana School Boards Association, 1999).

A database of all the superintendents who served in Montana from 1977/78 to 1997/98 was compiled (Carson, 1999). The data revealed that 35% of all the superintendents who served during that time period left the superintendency and did not return to the position. This indicates that these individuals may have taken a job other than the superintendency, retired, or moved out of state to work.

According to the certificates issued in the state of Montana during 1996-97, within 10 years nearly 50% of the principals and 60% of the superintendents will be new to their position, since many of the current administrators are likely to have retired by 2007 (Office of Public Instruction, 1999). The most recent data from OPI (2001) indicates that in 1998-99 the average age of retirement in Montana was 57 years. On average these individuals had 25.9 years of service. In this year, 478 individuals retired (see Figure 4).

Figure 4. Average Annual Retirement—Montana TRS (Office of Public Instruction, 2001).

	Average		***Total***
Year	**Age**	**Years of Service**	**Retired**
1994-95	56.2	25.9	362
1995-96	56.9	24.9	354
1996-97	56.2	25.9	411
1997-98	56.5	25.8	415
1998-99	57.0	25.9	478

State Examples of Incentives

In order to attract and keep highly qualified school leaders, some states are instituting incentive programs related to salary, pension portability, and bonuses. In Florida monetary awards were given to outstanding schools who demonstrated sustained high performance or exemplary improvement due to innovation and effort (Council of Chief State School Officers, 2001). Texas also rewards schools that demonstrate progress or success in achieving the education goals of the state through the *Texas Successful Schools Awards System*. The state of Missouri awards incentive grants to be used for a variety of leadership development activities. And in New Jersey outstanding principals are rewarded through the *New Jersey Principal of the Year* program.

Finally, Rhode Island has attempted to make an interstate compact on pension portability for educators, but as of yet, no other state has signed the compact. The goals of the program are to provide for a more flexible workforce that is better able to match jobs to employees, which could decrease shortages in specific geographic areas.

Performance Review

The purpose of evaluating any school employee should be ultimately to improve the quality of education for students. In superintendent evaluations, the process should also serve to strengthen the working relationship between the board and superintendent. However, Kowalski (1998) states little evidence exits that proves the two are related. In the best case scenario evaluation should be annual, formal, objective, and ethical. Importantly, it should be linked to the overall improvement of the school district. Best practice, according to Kowlaski, would be to make performance evaluation a part of the superintendent's contract. Such a provision protects the superintendent from being fired for political reasons. A minimum of three evaluations per year is recommended—one in the beginning of the year when goals, aspirations, needs, and priorities are established, as well as evaluation criteria and process. The second evaluation should be held in the middle of the year where the superintendent should be given a progress report from the board. Lastly, a final evaluation should be done at the end of the year that should include a judgment about the superintendent's performance and a discussion of the next evaluation cycle.

The reality is that almost all of the superintendents questioned in a national study indicated that they are evaluated annually, but that only 50% of them believed they are evaluated according to the criteria in their job descriptions (Glass et al., 2000). They reported the major reasons they are evaluated is to ensure systematic accountability and to establish performance goals. The process of evaluation was described as formal, using an evaluation instrument and numerical point values. This system was often used in conjunction with an appraisal by board members of communication and other skills not easily quantified. Superintendents felt that school boards expected them to be both education leaders and general managers.

The Institute for Educational Leadership *(Leadership for student learning: Reinventing the principalship*, 2000) recommends policies be written that make retention of school leaders hinge on leader evaluations, that are at least based in part on student achievement.

In South Dakota a recent study was done on superintendent evaluation processes (Christensen, 2000). Almost all the superintendents reported being evaluated and nearly all evaluations were done annually, with the entire school board having the most input into the evaluation process. Interestingly, both school board presidents and superintendents believed that board/ superintendent relationship is the primary criteria used in superintendent evaluations.

In order to make the evaluation of principals more relevant to principals' job functions, Brown, Irby, and Chance (1997) advocate the adoption of a new evaluation procedure. They developed the *Administrative Portfolio Evaluation System* that consists of a "purposeful, self-selected collection of artifacts and reflective entries which represents an administrator's growth". They believe that this collection would serve to "effectively promote professional growth and inform practice". It would be a viable evaluation tool and be both formative and summative. The authors believe the model meets the demands of traditional administrator evaluation systems and also promotes professional growth and student achievement.

State Examples of Performance Review Policies

School leaders in Ohio must be reviewed annually, and twice during contract renewal years (Council of Chief State School Officers, 2001). In contract renewal years, the initial review must

identify the administrator's strengths and weaknesses and include suggestions for improvement. The final evaluation must list these strengths and weaknesses and discuss the progress that has been made to improve. Tenure does not exist for Ohio school leaders.

In Kentucky local school districts must develop an evaluation plan and procedures for mandatory evaluations of all school employees (Council of Chief State School Officers, 2001). These plans must be approved by the department of education. An *evaluation committee* made up of an equal number of teachers and administrators at each school district develops evaluation plans and procedures. A primary evaluator at each school district is appointed, trained, tested, and certified.

Local control is also given to school districts in Virginia to develop procedures for performance evaluations of all school personnel (Council of Chief State School Officers, 2001). School districts use *Guidelines for Uniform Performance Standards and Evaluation Criteria for Teachers, Administrators, and Superintendents* as a guide in developing their evaluation procedures.

Performance Review of Montana School Leaders

The School Administrators of Montana (SAM) reports that it does not have copies of evaluation forms used for superintendents in Montana, other than perhaps a sample form from the American Association of School Administrators (Sykes, assistant director, personal communication, July, 2001). There is no standard evaluation instrument used with superintendents or principals in Montana.

According to state law (20-4-401) school boards shall issue contracts to a district superintendent for a term of not more than three years, and after the second successive contract, the contract shall be renewable for a further term of one year from year to year unless the majority of trustees decide to terminate the district superintendent (School Laws of Montana, 2000). The school board must notify the superintendent in writing of their intent to terminate the contract with the superintendent by February 1st. Tenure does not exist in state law for superintendents, but does for principals. Principals, as do teachers, receive tenure after three years of successful teaching at a public school in Montana.

<u>Selection of School Leaders</u>

Selection Processes

Glass et al. (2000) found in a national study of superintendents that most school boards form their own search committee when looking for a new superintendent. Typically this committee is made up of board members and staff who write a job description that is then sent out to universities, state associations, professional publications, and newspapers. The board then meets to choose candidates to interview. The smaller the school district, the more likely it is to use this method of superintendent selection. In the very large districts an independent search firm conducts the superintendent search 46% of the time.

These superintendents indicated they were selected because of their personal attributes 40% of the time. In a study ten years earlier 66% indicated they were hired for their personal attributes. However, in small school districts superintendents were more likely to site personal characteristics as the reason they were hired. The next two top reasons for being hired were to be a change agent in the school district or to be an instructional leader.

In a recent study of the superintendent search in a school district (Kinsella, 2000) the author concluded that while the use of professional credentials was important in the initial stages of the search, personal attributes proved critical in the eventual selection. These personal attributes were the candidate's likable, identifiable human qualities.

According to Winter (1997) the most useful selection practices are those that focus on job-related information and sample actual job behaviors. Two of the most useful of these practices are structured job interviews and assessment tasks. Another tool that proved to have high validity and reliability is the use of an assessment center. Here multiple methods are used to assess job candidates by having candidates perform actual and simulated job tasks. Paper and pencil tasks, structured interviews, in-basket exercises, and leaderless group activities are typical techniques used in assessment centers.

Successful Rural Principals and Superintendents

When considering selecting a superintendent it is important to understand what makes a superintendent successful in the position. Chance (1999) studied what makes a successful rural su-

perintendent. All of the successful superintendents he studied were born and reared within 100 miles of the school districts they led, pointing to the importance of understanding the local context of the school. They were highly visible at all school district activities and events. Others viewed them as "people oriented" and saw leadership as guidance of people more important than the management of things. They were listeners of their constituents and tended to take traditional approaches while supporting worthwhile innovations. They rarely socialized with board members outside of the school, but did often communicate on an informal basis with board members. This had a wide stabilizing effect on the school district that allowed for a concerted focus on students' success and performance.

Smith studied principals who were successful in rural schools (1999). Her research showed that principals should focus on people and relationships, be sincere and move slowly, and expect to work hard, since many rural school communities expect their principals to be "servant leaders".

Comparison of Best Practice to Current Practice in Montana

Perhaps one of the biggest disincentives for individuals seeking administrative positions in Montana is the low salary associated with the job's increased responsibilities. Montana superintendent, high school principal, and elementary school principal salaries were well below both the national and regional mean in 1997, according to a state-wide study conducted by the School Administrators of Montana. The biggest difference in salaries occurred between Montana superintendents and the national mean salary for superintendents. On average, Montana superintendents received $43,309 less pay than superintendents around the nation. Additionally, Montana superintendents' salaries were $23,816 below those in the Rocky Mountain region.

Superintendents and principals studied in Montana agree the three incentives that would most encourage them to remain in school administration were improved salaries, improved retirement benefits, and increased earning power after retirement (Montana School Boards Association, 1999). In the same study, school board chairs indicated the four incentives they used most often to keep qualified administrators were negotiating with the board for salary and benefits, offering competitive

salary, paying dues for professional associations, and offering money and support to attend professional development activities.

This section also covered the topic of superintendent and principal performance review. The literature claimed the ultimate aim of evaluating any school employee should be to increase the quality of education for students. For superintendents, performance evaluation should be a part of their contract, in order to protect the superintendent from being fired for political reasons. However, in some studies the primary criteria used in evaluations was the relationship between the school board and superintendent. The portfolio approach has been advocated by some authors as an effective way to design principal evaluation, since it would meet the demands of traditional evaluation systems and also promote professional growth demonstrating links to student achievement.

Montana has no state-wide standard for superintendent or principal evaluation. School districts are free to adopt their own evaluation tools. Superintendents do not earn tenure under state law, but principals can.

The selection process of school leaders was discussed in this section. Typically in the nation, most school boards form their own search committees that are charged with selecting a superintendent. In fact, the smaller the school district the more likely this type of selection process is used. Larger districts are more likely to use a professional search consultant. The most useful selection practices, according to the literature, are those that focus on job-related information and sample actual job behaviors. Structured job interviews and assessment tasks are two of the most effective tools to use in selection. However, most superintendents in the nation surveyed indicated that most often they were selected because of their particular personal attributes. The smaller the school district, the more likely this was to occur.

Selection processes vary across Montana. Some districts use their own search committees, and some use a consultant from the Montana School Boards Association, local universities, or other organization. For the 2001-2002 school year, search consultants from the Montana School Boards Association were used in 8 of the 40 superintendent searches in the state.

VI. Governing Structures and Authority for Practice

The current push for increased student achievement has resulted in school leaders being held accountable for their students' successes or failures. Unfortunately the authority they are given to accomplish these goals is often not proportionate to the assigned tasks. State policy is responsible for determining the legal authority under which principals and superintendents practice. It also specifies the way school boards and superintendents operate, thus impacting the relationship between the two. "States can improve the overall effectiveness of educational leaders by analyzing and being certain these relationships of authority and structure provide environments conducive to creative instructional leadership and improved student learning" (Council of Chief State School Officers, 2001).

Currently new structural patterns for school governance are being tested. These include shared decision making often using school councils, state mandated school improvement plans, alternative plans for school board governance, state take over of poor performing schools, and charter schools.

Types of Governance Structures

The Education Commission of the States (1997) explains that calls for a new look at the way America's schools are governed are initiated by those who are dissatisfied with the progress of current improvement efforts, by those who have a distaste for bureaucracy, and by those who desire decentralization, or a return of control, of education decisions and resources to the people closest to the students. Foundations, businesses, community organizations, and policy makers have invested heavily in education reform initiatives. The report explains that the dominant education governance structure in the United States is hierarchical and bureaucratic, designed to resist change and promote stability. The question is if this structure will be able to be flexible enough to withstand the shift from a manufacturing-based economy to an information and service-based one.

The National Commission on Governing America's Schools, a report issued by the Education Commission of the States in 1999, recommends two types of governance structures. One is a system of publicly authorized, publicly funded and publicly operated schools, based on some of the

more promising trends within the prevailing system of public education governance. The other is a system of publicly authorized, publicly funded and independently operated schools, based on some of the more promising alternatives to the prevailing system of public education governance. Renchler (2000) explains that the first recommendation extends current governance structures to include a few experimental strategies, and the second recommendation argues for increased privatization of school governance.

Shared Governance

In a study of the nation's principals it was reported that principals were more active in involving teachers and parents in school based decision making compared to ten years earlier (Doud & Keller, 1998). Principals noted involving parents and community in school site councils. However, with this increased influence they also noted decreasing authority to make decisions, particularly in relation to the degree to which they were held responsible when things go wrong.

Superintendents nominated for having effective governance teams that raised the level of student achievement were studied (Lewis, 2000). Recommendations from the study for aspiring superintendents were that individuals seek training in vision-setting and communicating a vision for student achievement, and seek opportunities to be mentored by successful superintendents with ability to focus the energy of the board on improvement of student learning. A further recommendation was that time be allowed at board meetings for curriculum and assessment reports that focus on student achievement.

Most of the superintendents in a national study felt that their boards are favorable to site-based decision making at the school level (Glass et al., 2000). The authors explain that research has been generally unsupportive as to whether site-based decision making has positively affected student achievement. They explain that the roles of school leaders have been altered by changing levels of responsibilities and the working relationships with school boards.

Similar findings were reported by Malen (1999) concerning the successes of site-based decision making, or shared decision making, over 50 years. Specifically she describes that councils that include parents in the decision making process, especially in minority or low income populations,

have been less than successful. She explains that although site councils tend not to operate as centers of democratic governance, they may serve important political functions. They are a place to "air complaints and assuage concerns, forums to rally support for/reduce resistance to policies made elsewhere, symbols of parents' right to a voice in decisions, and signs that the organization recognizes that right".

A recent study discovered similar findings about the changing role of the principal with participation in shared decision making (Cunningham, 2000). One aspect of educational leadership that has not been addressed is the problem of who has control when everyone is empowered and shares an equal voice. The study found that principals view their role differently than do their constituents. Principals see themselves as leaders while their constituents depend on them to be managers.

Shared governance, including parent involvement and site-based decision making, and the influence of school leader's professional background were studied (Talbot & Crow, 1999). Findings were that the more years in education and the more experience in administrative assignments principals had, the more likely they were to perceive constituents as influential in school decisions. Principals with more educational certificates were more likely to view other constituents as influential. However principals who earned more degrees and higher degrees were less likely to perceive others as having input into school decisions. The authors concluded that degree programs may create a depth of understanding within a specific area, but earning certificates may offer breadth of perspective for those involved.

The Chicago School Reform Act of 1988 gave local school councils the authority to make school-based decisions and develop site specific School Improvement Plans. A study of the operation of these local school councils was conducted in 1997 (Ryan, Bryk, Lopez, Williams, Hall, & Luppescu). They found that most local school councils "quietly oversee school policy and carry out their official duties of evaluating the principal, approving the budget, and approving and monitoring the School Improvement Plan". Most often they cite success in improving core academic programs, followed by improving the physical environment, improving attendance and discipline, and finally increasing the amount of parent participation in the school. The study found that overall most of the

local school councils are successfully operating as viable governance organizations. According to a 1998 study by the University of Chicago, public schools in Chicago made only slight gains between 1997 and 1998 on the Illinois goals Assessment Program (Ziebarth, 1999).

Policy Governance

A model often cited in school governance is *policy governance*, developed in the business industry by John Carver (2000). The basic tenet of policy governance is that the school board makes policy, and the superintendent is then allowed to carry it out. This implies that the school board is prohibited from involving itself in the day to day management of the school. It also suggests that the superintendent is equally responsible for successes and failures. The superintendent gets full authority to manage the district however he or she deems appropriate on two conditions: (1) the superintendent's actions must be aligned with board policy; and (2) the decisions must be made within the limitations the school board chooses to place on the superintendent (Natale, 2000).

Policy governance offers the superintendent freedom to do the job, but this freedom is balanced by accountability for results (Dawson & Quinn, 2000). In their work with school boards who chose to put policy governance into action, they have found that in each instance school boards and superintendents have seen the advantages of the model and eagerly embraced it. But certain authors believe that some schools have been successful carrying out tenets of policy governance because they have adapted the model to fit their needs.

School Takeovers

Wang and Walberg (1999, in Renchler, 2000) recommend a system of governance where states and local school boards would create basic standards that schools could use to develop their own ways in which to meet. In this model, schools that failed to meet the standards would have a set of educational "best practices" imposed upon them. Continued failure to meet the standards would result in closure of the school, and students given scholarships to attend either public or private schools. This model would encourage schools to be entrepreneurial enterprises where students decide what is best for them.

In some instances states or mayoral takeovers of poor performing schools have taken place in the nation. Mayoral takeovers have taken place in urban schools in Chicago, Boston, Detroit, and Cleveland. The effect of mayoral control on overall school performance has yet to be documented (Renchler, 2000). State takeover decisions have been made for a variety of reasons. Ziebarth (1999) lists these reasons as poor student performance, crumbling infrastructure, fiscal mismanagement, inept administration, and corrupt governance. He explains that state takeovers are usually the last step in a series of interventions by state departments of education. As in mayoral takeovers, Ziebarth notes a lack of research on the effectiveness of state takeovers (see Figure 5).

Figure 5. Ziebarth's Compilation of What Proponents and Opponents Think of State Takeovers of Public Schools.

Proponents of State Takeovers	Opponents of State Takeovers
Are a necessary extension of a state's constitutional responsibilities	Represent a thinly veiled attempt to reduce local school board control and increase state authority over school districts
Provide a good opportunity for state and local decision makers to combine resources and knowledge to improve children's learning	Use narrow learning measures (i.e. standardized test scores) as the primary criterion for takeover decisions
Allow a competent executive staff to guide an uninterrupted and effective implementation of school improvement efforts	Imply that the community has the problems and the state has the answers and thus, falsely assume that states have the ability to effectively run districts
Are a catalyst for creating the right environment for the community to address a district's problems	Place poorly prepared state-selected officials in charge, with little possibility of any meaningful change occurring in the classroom
Allow for more radical, and necessary, changes in low-performing districts	Usually focus on cleaning up petty corruption and incompetent administration and do not go to the root of the social problems facing disadvantaged students in urban districts
Place school boards on notice that personal agendas, nepotism, and public bickering have severe consequences	Foster negative connotations and impressions that hinder the self-esteem of district board members, administrators, teachers, students, and parents
	Produce showdowns between state and local officials which slow the overhaul of management practices, drain resources from educational reforms, and reinforce community resentments

Charter or Magnet Schools

Charter schools have been provided for by law in several states. These are independent public schools, provided with public funds to operate. They are designed and operated by educators, parents, community leaders, education entrepreneurs and others. They are sponsored by local or state educational organizations, but free from traditional bureaucratic controls that public schools

must adhere to. Charter schools are held accountable for student achievement goals established by their charter, and how well they manage the fiscal and operational responsibilities entrusted to them. If they fail in their goals, they are closed. According to the Center for Education Reform (2001), academic rigor is one of the primary reasons for the charter school movement. While they claim it is too early to measure charter schools' broad academic success, anecdotal evidence suggests that students are learning and excelling.

In 1993-94 about 8% of the school districts in the nation offered some kind of school choice (Levine & Christenson, 1998). These programs were most likely to be offered in large districts with more than 10,000 students, in central cities, or with large minority student and teacher populations.

Currently there are 38 charter school laws in the United States. Over 2,000 charter schools are operating in 34 states and the District of Columbia, serving over 500,000 students (Center for Education Reform, 2001). (See Figure 6).

Figure 6. Statistics of Charter Schools in the United States compiled by the Center for Education Reform.

State	Schools Operating Fall 2001	Enrollment Fall 2000
Alaska	16	1,271
Arizona	416	94,759
Arkansas	4	748
California	302	121,598
Colorado	79	19,128
Connecticut	16	2,138
Delaware	7	2,686
D,C,	33	9,254
Florida	149	27,713
Georgia	38	21,855
Hawaii	6	2,370
Idaho	11	1,028
Illinois	22	5,107
Kansas	13	1,788
Louisiana	21	3,905
Massachusetts	41	11,565
Michigan	185	53,102
Minnesota	68	9,411
Mississippi	1	334
Missouri	21	5,782
Nevada	7	1,214
New Hampshire	0	0

New Jersey	54	13,518
New Mexico	11	1,506
New York	23	7,057
North Carolina	94	18,516
Ohio	68	18,081
Oklahoma	6	1,450
Oregon	12	752
Pennsylvania	65	17,667
Rhode Island	3	533
South Carolina	9	700
Texas	165	38,107
Utah	8	315
Virginia	2	30
Wisconsin	87	7,210
Wyoming	0	0
Nationwide Total	**2,063**	**518,609**

The Colorado Charter Schools Evaluation Study (Fitzgerald, 2000) found that the performance of charter schools, as a whole, was stronger that the state averages, sponsoring district averages, and other public school averages of the same socioeconomic classification level on the Colorado Student Assessment Program for the 1998-99 school year. Additionally, the majority of charter schools were meeting or exceeding the performance goals they identified in their individual charter applications and in school improvement plans. Parent participation in charter schools was high, and other indicators of waiting lists, retention rates, and parent satisfaction were positive. Diversities in size, educational programs, philosophies, and approaches to governance and assessment strategies existed in Colorado charter schools.

No provisions exist in the law for charter schools in Montana.

State Examples of Governance Structures Established in State Policy

The state of Kentucky adopted the *Site-Based Decision Making* model of governance and as a result changes in its statewide educational governance structure (Council of Chief State School Officials, 2001). It represents the state's effort to shift power, autonomy, and authority to the local level while still maintaining its function of oversight and accountability. School councils are required at each school site, and are responsible for setting school policy consistent with district board policy. This policy makes the school council responsible for providing an environment that enhances stu-

dent achievement. The principal, or head teacher, is considered the primary instructional leader of a school, and is responsible for administering the policies established jointly by the school council and local school board. Principals are responsible for making hiring selections supplied by the superintendent.

A new statewide governance structure in Texas has resulted from the state's effort to improve education (Council of Chief State School Officials, 2001). A district and school level planning and decision making processes has been developed in order to improve student performance. It is intentionally coordinated with the statewide Standards and Accountability mechanism. Each school district must develop a *District Improvement Plan*. Local school boards are responsible for the existence of the plan, along with establishing procedures under which meetings are held. They must also ensure that the district and school plans are developed, reviewed, and revised annually.

Superintendents in Vermont are appointed by supervisory unions and district boards (Council of Chief State School Officials, 2001). The union board is responsible for developing superintendent duties, which are specified prior to employment in a written contract. Superintendents recommend principal candidates to the school board. Principals are responsible for performing duties specified by law, the superintendent, or policies adopted by the school board.

Authority for Practice

Superintendent and School Board Relations

The literature on superintendent/board relations abounds with research that points to conflicts between the two as one of the primary reasons superintendents decide to move to another position. Often times these conflicts have had their roots in differing job expectations held by boards and superintendents. They could also be caused by political turmoil in the school district, which could result in a change of board membership. In many instances, this change of board membership is a sign of a community's dissatisfaction with the school district (Iannaccone & Lutz, 1978). A change of board membership could result in less support for the superintendent, leading to conflicts between the two. Lastly, role conflicts often are the result of an overlap of responsibilities of superintendents

and school boards. This is often cited as a reason superintendents decide to move on to another position (Glass, et al., 2000).

The Glass et al. study found that most often superintendents initiate new policy and are usually responsible for the direction of the school district. However, the study found that more than at any other time, superintendents reported sharing policy initiation with the school board. Shared responsibility for policy initiation was most commonly found in larger school districts. Overall, superintendents indicated they provide board members with primary orientation. State school board associations provide this primary orientation 16% of the time. Most of the superintendents reported they frequently, or very often, seek community involvement. In both the 2000 and 1992 study, superintendents rated board members as generally "qualified", but not "well qualified". However, when superintendents were asked to rate board members' abilities on a more formal basis, they generally gave them positive appraisals. Superintendents in very small districts least often rated board members as "very well qualified". Only a small fraction of superintendents see their board as being dominated by an elite group, indicating their boards were generally aligned to community interests.

A recent study of superintendent/board relations focused on how the communicative adaptability of superintendents may influence board presidents in the evaluations of superintendents (Craig, 2000). The study found that there was no relationship between communicative adaptability and superintendent effectiveness. Differences were found between board presidents and superintendents in their perceptions of four specific dimensions of communicative adaptability: social composure, social experience, articulation, and wit.

A study of board chairs and superintendents in Virginia centered on perceptions of local governance issues (Feuerstein & Opfer, 1998). Virginia was the setting of the study since it offered a unique context in which to study board and superintendent relationships. The state was shifting from appointed to elected school board members, providing researchers with an opportunity to study the representative function of school boards in various types of settings. It also allowed for studying the impact this change had on board/superintendent relations. The quantitative findings suggested several notable differences and similarities between perceptions of board chairs and superintendents

on issues of school governance, in appointed and elected boards. It appears that communities with elected or mixed (both elected and appointed) boards were confronted with a greater number of interest groups and controversial issues than communities with appointed boards. However, the qualitative data revealed areas of similarity between the two. This lead the researchers to conclude that differences in the perceptions of school leaders in communities with both appointed and elected boards are embedded within broader areas of consensus. The authors explain that "questions arise concerning the positive aspects of appointed school boards and their ability to reduce role confusion between the board and the superintendent, the extent to which elected boards are able to represent community interests in the face of low voter turnout, and ways of improving the function of elected and appointed school boards".

State Examples of Authority for Practice in State Policy

In Rhode Island the school superintendent, acting under the direction of a school committee, is responsible for the care and supervision of public schools, and serves as the chief agent of the school committee (Council of Chief State School Officers, 2001).

Florida recently recognized that principals are the administrative and instructional leaders of public schools, and that strong, competent principals can improve the schools (Council of Chief State School Officers, 2001). Local school officials are now vested with the authority to hire and train principals and assistant principals.

Illinois law was recently revised to assign principals both administrative and instructional leadership responsibilities (Council of Chief State School Officers, 2001). The law specifies that principals spend a majority of time working on instructional issues, including curriculum and staff development, and establishing clear lines of communication regarding school goals, accomplishments, practices and policies with parents and teachers. They are also responsible for evaluating the educational program and making recommendations to the superintendent regarding hiring decisions.

Duties of Superintendents and Principals in Montana

According to state law, superintendents and county high school principals are responsible for the following activities (School laws of Montana, 2000, MCA 20-4-402):

1. have general supervision of all schools of the district and the personnel employed by the district;
2. implement and administer the policies of the trustees of the district;
3. develop and recommend courses of instruction to the trustees for their consideration and approval in accordance with the provisions of 20-7-111;
4. select all textbooks and submit the selections to the trustees for their approval in accordance with the provisions of 20-7-602;
5. select all reference and library books and submit the selections to the trustees for their approval in accordance with provisions of 20-7-204;
6. have general supervision of all pupils of the district, enforce the compulsory attendance provisions of this title, and have the authority to suspend for good cause any pupil of the district;
7. report the cumulative pupil attendance and pupil absence of the district and any other pupil information required by the report form prescribed by the superintendent of public instruction to the county superintendent, or county superintendents when reporting for a joint district, within 10 days after the conclusion of each school semester; and
8. perform any other duties in connection with the district as the trustees may prescribe.

According to the same statute, a principal working in a school district that does not employ a district superintendent is responsible for the above items. Principals employed in a district that also employs a superintendent are given the authority in the law to suspend for good cause any pupil of the school where the principal is employed.

Comparison of Best Practice to Current Practice in Montana

New structural patterns for school governance are being tested throughout the Untied States. For example, some school districts are mandated by the state to establish school councils, or write school improvement plans. States such as Kentucky require each school district to use shared decision making in their school council. Typically, school councils across the nation are made up of a variety of constituents, and are aimed at giving individuals involved in the schooling process a voice in decision making. This approach represents the state's effort to shift power, autonomy, and authority to the local level while still maintaining its function of oversight and accountability.

The Education Commission of the States in 1999 issued a report from the National Commission on Governing America's Schools. Recommendations were to extend current governance structures to include a few experimental strategies, and to increase privatization of school governance.

Charter schools are one form of an experimental governance structure. They are allowed for by law in 38 states. Current statistics show these schools serve a total of 518,609 students in 2,063

schools (Center for Education Reform, 2001). While they claim it is too early to measure charter schools' broad academic success, anecdotal evidence suggests that students are learning and excelling. No provisions exist in state law for charter schools in Montana.

In some states, departments of education have taken over poor performing schools. In certain cities mayoral takeovers of poor performing city schools have occurred. There is a lack of research on the effectiveness of both state and mayoral takeovers.

Many states are recognizing that principals are the administrative and instructional leaders of schools, therefore, they should be responsible for making decisions in these areas. Superintendents are also being held responsible for the care and supervision of schools. Some schools are adopting the Carver model of policy governance. The basic tenet of the model is that the school board makes policy and the superintendent is then allowed to carry it out. This implies that the school board is prohibited from involving itself in the day to day management of the school. However, the superintendent is equally responsible for successes and failures of the school district. The superintendent's decisions must be aligned with board policy and made within the limitations the school board chooses to place on the superintendent.

In Montana, school boards are responsible, among other things, for their school's academic program, and for all of the hiring and dismissal decisions in their school district (School laws of Montana, 2000) (see Appendix C.). Each school must receive accreditation from the Office of Public Instruction. Effective September 1, 2001, schools that are in compliance with Montana Code 20-4-101, may be accredited for a period consisting of 1-5 years at the sole discretion of the Board of Public Education (K-12 education: 2001 legislative session summary of legislation related to K-12 education, 2001).

As stated earlier in the report, superintendents in Montana are responsible among other things, for the general supervision of all schools of the district, its students, and personnel employed by the district, carry out the policies of the district, for instructional programs, and perform any other duties in connection with the district as the trustees may prescribe (School laws of Montana, 2000, MCA 20-4-402) Principals employed in a district that also employs a superintendent is given the

authority in the law to suspend for good cause any pupil of the school where the principal is employed.

Women and Minorities in Education Leadership

Unique issues surround attracting, training, and hiring female and minority school leaders. This section of the report will include information on these topics as well as profiles of typical female and minority school leaders, barriers females and minorities face in their attempt to become school leaders, and attributes of successful female school leaders.

Profile of Female and Minority School Leaders

The most recent national study of superintendents found that the current number of female superintendents has increased from 10 years ago, but that a line graph of the percentages of female superintendents from each year over the last century is basically flat (Glass et al., 2000). The report states that without a doubt, the superintendency has been dominated by while males since it was first created in the 19th century. Minority superintendents have been dramatically underrepresented in this study. Of the female superintendents 5.1% were minorities, and of the males, only 2% were minorities.

This same study showed that on average, female superintendents were older than the average male superintendent. Of female superintendents 40% were between the ages of 41 and 50, while only 31% of the male superintendents were between these ages. Interview data revealed many women waited for their children to get older before pursuing positions that made heavy demands on their time. About 60% of the female superintendents spent at least 10 years in the classroom. Women generally were later to enter their first administrative position and were even later to enter the superintendency. Additionally, the study revealed that more female than male superintendents reported being single.

Most of the minority superintendents in the study were between the ages of 46 and 60, the same age of most of the non-minority superintendents. White males represent most of the superintendents who are under the age of 46. One can conclude from this research that minority superintendents tend to have the same professional track as non-minority superintendents. Minority superintendents have few specialist degrees, but a greater number of Ed.D.s and Ph.D.s than non-minority superintendents. Most of the minority superintendents are employed in the southwest, followed by

the far west and southeast. These minority superintendents are found in areas that have large minority student enrollments.

More minority superintendents than non-minority superintendents started their careers as some type of coordinator, but most began as either a principal or assistant principal, in the American Association of School Administrators 2000 study. Also, more minority than non-minority superintendents reported taking longer to secure their first superintendent position.

The study revealed that more female (57%) than male (44%) superintendents hold either Ed.D.s or Ph.D.s. Almost half of the female superintendents reported working in rural areas, and a higher number of female superintendents reported working in urban school districts. The number of female superintendents was highest in the Great Lakes and mid-east regions. The far west and southwest regions followed with the next highest number of female superintendents. Women reported leaving their last superintendency and accepting another superintendency with better financial situations. Also, the data showed that more women than men were likely to leave a district due to board elections or changing boards.

In a national study about school principals, although 86% of the superintendents surveyed have seen qualified female candidates apply for principal positions, only 17% of them said that increasing the number of women in management positions has been an issue in their district (*Is there a shortage of qualified candidates for openings in the principalship?*,1998). The same study found that more qualified minority candidates applied for principal positions in urban (60%) and suburban (50%) areas, while only 29% were found to apply for positions in rural areas.

According to the number of individuals who held principal and superintendent certificates in Montana during 1998-99, 24% of school leaders were female (Office of Public Instruction, 2001). American Indian principals and superintendents made up only 2% of the certified administrative personnel. The population of American Indian students, during the same period, made up 10.2% of the entire student population of the state. Other certified minority administrators made up .5% of the certified administrators.

Attracting and Recruiting Female and Minority School Leaders

Thomas Glass (2000) made recommendations based on the findings in the most recent American Association of School Administrators study of superintendents regarding the number of female superintendents. Recommendations given to attract more women to the superintendency are to: (1) change the nature of the superintendency by altering the oppressive workload; (2) school boards should make it possible for women superintendents to excel in what they like to do; (3) states and higher education institutions should provide incentives to women to gain the superintendent certificate; and (4) district and search firms should be rewarded by states for hiring female superintendents.

Mentoring

Mentoring has been examined by several researchers as a possible means of socialization for women aspiring to educational administration. Research done over the last two decades has shown that women who have a mentor, or series of mentors at various stages in their careers, can be extremely valuable in attainment of their ultimate goals (Scanlon,1997). Mentors foster career development by providing challenging growth opportunities that increase knowledge and self-reliance. They provide important emotional support, expand vision, develop awareness of institutional culture at top levels, and increase visibility with those in power.

Sometimes it is difficult for women to find a willing and capable mentor. Research has shown that women mentors may tend to establish exceptionally high standards, sometimes unrealistic ones, for their protégé as well as for themselves (O'Leary & Mitchell, in Scanlon, 1997). And sometimes a capable woman mentor is available but unwilling to involve herself with prospective women administrators.

The national study of superintendents found that more women than men reported having mentors (Glass et al., 2000). Most often it is the male superintendents who serve as mentors. In this study, less men than women believe that discriminatory practices exist. If these male superintendents do not believe that discriminatory practices exist, they will be less likely to understand the need for them to mentor and encourage women. Of the minority superintendents 90% of them reported they

had served as, or considered themselves, mentors. In interviews, minority superintendents explained that since there are so few of them, they need and want to serve more frequently as mentors.

Females Attracted to, But Not Seeking Administrative Positions

The majority of teachers are women, especially in the elementary level. According to McAdams (1998) many teachers pursue an administrative credential as a way of keeping their options open. But he found that many of these female graduate students are not interested in pursuing administrative positions. One reason for this is geographical limitations. Also many explain that their quality of life would be diminished, and others have concerns for what the job would do to their families.

A study of women who were certified but not obtaining administrative positions was conducted by DeFelice and Schroth (1999). Most often respondents described personal reasons for not seeking administrative positions. Respondents were typically in their mid 40s to late 50s, married, with no children at home. More than one third of them had previously held administrative positions, but relinquished them. Less than half had applied for an administrative position within the past five years. Two thirds were unwilling to relocate in order to take an administrative position. Strong internal barriers prevented these women from seeking administrative positions. These were family issues and lack of interest. Strong external barriers that prevented them were politics, the "good old boy" system, and sexual discrimination.

Wolverton et al. (2001) studied superintendents in the northwest region and found that the majority of both men and women indicated they were not seeking a superintendent position because they were satisfied with their current position.

Conclusions. Certain conclusions were made by DeFelice and Schroth in their study of the large number of women who pursued and obtained administrative certificates and advanced degrees in the field. Conclusions were that a considerable number of women decided not to obtain administrative employment because they simply did not want to do so, as did Wolverton et al. (2001). They cannot conclude that once a woman obtains an administrative position, she will stay in that position. They also cannot conclude that barriers women face in obtaining administrative positions are internal,

and that women must simply look within themselves to overcome these barriers. And lastly, they cannot conclude that women rush in to support and encourage one another when one of their own seeks an administrative position. Although women in education are surrounded by women colleagues, far too many women in the study did not receive any encouragement from their peers to advance into school administration.

Barriers to Women Seeking School Leadership Positions

Thomas Glass (2000) explained some of the findings in the 2000 American Association of School Administrators study of superintendents regarding barriers to women seeking the superintendency. Findings were that women are not in positions that normally lead to the superintendency. More than half of the women superintendents in the study came from a secondary background, where male teachers are the majority. The majority of superintendents began their administrative career as either an assistant principal or high school department chair. The position of assistant principal is rare in elementary schools. Also many superintendents indicated they had coaching experience in secondary schools. Few elementary teachers have this opportunity. Thus, middle and high school teachers have more entry points to move into school administration as the first step toward the superintendency.

Glass reported that while the number of females enrolled as graduate students in programs of school administration is more than 50%, and females are earning the same amount of doctorate degrees as men, only about 10% of the females in doctoral programs are opting to earn a superintendency credential.

Another reason Glass gives for the lack of female superintendents is their lack of experience in fiscal management. While boards of education are saying that instructional matters are important, they do not want an inexperienced superintendent in fiscal management. A third of the women hired as superintendents in the study indicated boards had hired them to be instructional leaders, while only 24% of the men indicated the same.

Glass also explains that women in the national study (2000) of superintendents felt the nature of the superintendency made it unattractive to women working as principals and central office

administrators. Many of these females may perceive it difficult to take a superintendent position if it means relocating. In the study both men and women felt that a woman's lack of mobility was the strongest barrier limiting career opportunities for women. For women, their personal lives continue to be a perceived limitation.

The impact of domestic relationships on women deciding to be superintendents was studied by Ramsey (1997). Her findings were that many female superintendents reported being affected by the impact taking a superintendency may have on their spouses and families. Also, problems women may have in personal relationships may curtail their career aspirations. However, parenting issues, more than spousal issues, may play a crucial role in a woman's decision to be a superintendent. Children can dictate how much time a woman commits to a job, how conflicted she feels about her private and personal lives, and when, if at all, she enters the superintendency. A woman may be also reluctant to relocate to a take a superintendency if her children are in high school. In this study, female superintendents said the biggest difficulty was the increased time demands of the job.

In a study of superintendents in the northwest region, Wolverton et al. (2001) found that women were less likely to be married and more apt to be divorced than men. The authors concluded that this may signal that a potential personal conflict exists for women who wish to pursue professional goals while maintaining a family. The study found that salaries did not differ across genders, but household incomes did. Women typically reported higher family incomes than men did, possibly indicating dual income families. Women superintendents in the study were also more highly educated than men.

Marshal (in Hackney, 1998) theorized that women take one of three paths in their careers when they encounter uninviting cultures in their professional experiences. First they may become satisfied with a staff level position and decide not to enter the administrative arena. They may give up any aspirations they have for leadership and return to classroom teaching. Or, they find a balance between their professional and feminine identities, buy into the "female as deficient" notion, work harder, and play games to achieve.

How Others Perceive Women as School Leaders

California and U. S. superintendents were questioned about their perceptions of women in the superintendency (McCabe, Jamison, & Dobberteen, 1998). California superintendents appear to see less conflict between the role of wife, mother, and superintendent. A significant difference was found between U. S. superintendents and California superintendents in the assumptions concerning constraints of authority, forcefulness, confidence, and knowledge of building maintenance. Findings indicate that either California women do not consider these five items constraining, or the culture and norms of California school districts are more supportive of women superintendents.

Perceptions of selected school administrators in Michigan toward women as managers was studied by VanderJagt (2000). Results of the study showed that there was a statistical difference between attitudes of male and female administrators toward women as school leaders. There was no significant difference in the attitudes of secondary principals and upper level administrators toward women as school leaders.

On a similar topic, a study examined the perceptions of superintendents and school board presidents toward women in educational leadership (Shepard, 1997). Comparing results of the same type of study done in 1978, findings were that the attitudes of those persons responsible for hiring school district administrators are more accepting toward women in 1996 than in 1978. However, there are many areas where reservations still remain regarding the capabilities of women as district superintendents. School board presidents had more of an issue with this than did superintendents, and men had more of an issue than women.

Barriers still exist to women aspiring to be secondary principals and superintendents (Logan & Scollay, 1999). Lack of access to the secondary principalship blocks further access to the career path leading most often to the superintendency. Some of the traditional deterrents still apply in many cases. For example, the perceptions that women principals will have difficulties handling discipline problems and that they will be unwilling to supervise evening activities are still prevalent. Doubts about women and politics are also a barrier to women seeking the superintendency.

Gender Differences

In Texas, male and female superintendents of small rural school districts were questioned regarding their perceptions of leadership practices (Boone, 1997). Differences between male and female respondents were found in leadership topics of *challenging the process* and *modeling the way*. No differences were found between the two in leadership topics of *inspiring a shared vision, enabling others to act,* and *encouraging the heart*. Boone concluded that these results are consistent with gender differences found in other studies.

Skrla (1999) believes the gender differences between male and female superintendents are a result of a normalization process in a perpetually male dominated role—that of superintendent. From research, Skrla concludes women are affected by the predominant view that women do not become superintendents because they do not seek the position. Women are perceived as not being ambitions. According to previous research, many female superintendents report being "sought out" for the superintendency, even though they were content in whatever role they were in. Another normalization of femininity/masculinity in educational administration is the assertion that there are essential differences in leadership style between men and women. Women's ways of leading are most often described as caring, connected, and relational, in contrast to the male styles of authoritarian or bureaucratic. The way that women use power is another means of normalization of femininity/masculinity in educational administration. "In an organization that has strictly observed gendered norms, it is impossible to be simultaneously feminine and in charge." Skrla concludes that these forms of normalization of femininity/masculinity in educational administration have served to perpetuate the staggering under-representation of women in the public school superintendency.

Encouraging Leadership in Women

Creating the right environment for attracting women into school leadership positions is an important factor for organizations to consider. If one's sense of performance self esteem is high, one behaves as a leader would and is often chosen by the organization as a leader (Stakes in Hackney, 1998). "If self esteem is indirectly influenced by the group, there exist opportunities for the organization as a mediating force in creation of an environment where self esteem can flourish" (Hackney, 1998).

Hackney concluded that current education leaders must take the responsibility to stimulate professional conscience in order to confront disparity and exclusivity within an organization. They must disassociate themselves from the "prevailing paternalistic culture and begin speaking out, acting out, and encouraging new ways of engaging in the business of schooling". Current educational leaders must model collaboration, offer career and intellectual guidance, build friendships, diffuse power and disseminate information among all members of the school community. Furthermore, educational leaders must listen, accept, and appreciate the contributions of each other. "With care for the person, and an understanding of human development at the core in interaction, members of the educational community need to respect and encourage authentic voice—that which is original and meaningful—rather than that which is produced in a relentless effort to please authority or attain promotion."

Shepard (1997) recommends that efforts be made to increase the awareness of school board presidents of the abilities and skills of women seeking superintendencies. Also superintendents must be key participants in this effort by displaying their support of women, recommending them for leadership positions, and being mentors and sponsors of women who seek to be superintendents.

Women and Minorities in Superintendent Selection

The believe that the "good old boy" network exists is held by 53% of superintendents responding in a national study (Glass et al., 2000). This percentage has decreased from ten years ago leading the researchers to conclude that perhaps there is an opening of the superintendency to more women and minorities. But the fact remains that women and minorities are woefully underrepresented in the superintendency across the nation. In this study, women and minorities made up 15% of the superintendent positions. However, about 70% of the superintendents in the study felt that discrimination against women posed little or no problem. Interestingly, these superintendents in general believed that women have a more difficult time being hired than do minorities. Large school district superintendents in the study felt that discriminatory hiring is more of a problem than did superintendents in smaller school districts. Additionally, most of the minority superintendents in the

study worked in minority school districts. The researchers concluded that these superintendents seem to be locked into minority populated districts.

In the same study, professional search firms hired slightly more minority superintendents than they did non-minority. Minority superintendents believe discriminatory hiring practices are more of a problem than their non-minority counterparts. And women, more than men, believed discriminatory hiring practices exist.

Reasons for Hiring

Minority Superintendents. Many more minority, rather than non-minority or female superintendents, in the American Association of School Administrators study felt that they were hired to be change agents (Glass, et. al, 2000). Since most of the minority superintendents were hired in primarily urban areas, it is not surprising that boards would be looking for change agents in order to resolve conflict and move the school district toward reaching national means in student achievement and graduation rates. Additionally, minority superintendents reported a higher number of females on their school boards. However, there was a slightly lower number of females on their school boards compared to what female superintendents reported. Slightly more minority and female superintendents, than non-minority superintendents, reported their school boards seek citizen participation "all the time".

Female Superintendents. In the same study, factors that may advance the career opportunities for women were identified. Women (83%) and men (62%) agreed that women's interpersonal skills are the most influential factor for advancing career opportunities for women. Over 75% of the women superintendents surveyed felt their ability to maintain organizational relationships and their responsiveness to the community are also important factors that may advance their careers. Of men, 56% felt these were important leadership attributes.

The study also found that female superintendents move into their positions from the inside more often than do male superintendents. However, the majority of both men and women come into the superintendency from another school district. Women in the study felt they were hired because of their ability to be instructional leaders, the second reason was their potential to be change agents,

and the third reason was their personal characteristics. Male superintendents believed they were hired primarily because of their personal characteristics.

Recommendations to Consider in Hiring Processes

Logan and Scollay (1999) recommend the most likely path to change is to address perceptions of current superintendents, board members, and school council members who are directly responsible for hiring women school leaders.

Shepard (1999) recommends in order to increase the number of applicants, women must be supported and encouraged to seek administrative positions. Secondly, many women do not desire to relocate in order to take an administrative position. This lack of mobility indicates that individuals responsible for hiring should look internally and within neighboring districts for potential candidates, and encourage these individuals to apply. Shepard recommends women be encouraged and supported in the application process and given serious consideration at interviews.

Issues in Training Women in Educational Administration

The fact that more and more women are entering and completing graduate programs of educational administration cannot be disputed (Logan & Scollay, 1999). However, these women typically struggle to later attain administrative positions, and are particularly underrepresented as superintendents, assistant superintendents, or secondary principals. The researchers claim that more and more women are entering the field of educational administration as professors. Women and men in this field often serve as gatekeepers, making selections for internship placement, and having essential contact with local school districts who seek school leaders. No doubt, faculty encouragement is important for students pursing administrative careers. Although the increase in women as educational administration faculty does not automatically promote the advancement of women in school leadership, it may serve to validate women's leadership aspirations. "Mentoring for women students and networking with women administrators are commonly accepted strategies to encourage women to become school administrators" (Logan & Scollay, 1999, p. 104).

After studying research in the field, the authors recommend integration of gender differences as part of educational administration curricular content. Most often, however, program design is

based on the assumption that women and men perceive the world the same and little reference is given to gender differences. Instead, programs should emphasize a broad range of leadership skill, reflecting the strengths that both genders bring to leadership roles, advancing a more complete leadership repertoire for all students (Jacobs in Logan & Scollay, 1999). Attention should also be given to improving the hiring environment for women, something that is often overlooked in preparation program curriculum. The authors claim that since so many women are now entering educational administration programs, receiving certification, and earning more doctorate degrees than ever before, it is now time to shift the focus on recruitment to promotion of equitable employment and advancement opportunities for these women graduates.

Female superintendents in Texas were the subject of a study of essential skills necessary for success in the position (Saxenian, 2000). These essential skills were critical and necessary competencies identified by the American Association of School Administrators (AASA). The researcher sought to obtain perceptions of the importance of the competencies as they pertain to the daily practice of superintendents and the emphasis that preparation programs placed on them. Findings showed that the most critical areas perceived by female superintendents, that were not identified in the list of AASA competencies and skills, and that need to be addressed in university preparation programs, are finance/budget planning and politics. One recommendation is to include the female perspective in programs of educational administration.

As a result of her research on females who are aspiring to positions of school leadership, Hackney (1998) makes several recommendations for graduate leadership preparation programs. More contemporary leadership theory should be included, specifically transformational and relational leadership theories, which would balance programming with a multitude of perspectives. Course work in organizational psychology and culture should be encouraged. Reading and research done in the feminist perspective in a variety of methods of inquiry should be required. Joint leadership programs should be developed, including traditional administrative roles and also the preparation of teacher leaders who may some day assume active leadership roles.

Impact of Certain Characteristics Influencing the Number of Females in Educational Administration

Shepard (1999) studied two groups of individuals in educational administration. One group was students enrolled in preparation programs of educational administration, and the second group was alumni of the program. Both men and women in each group were studied. Overall, findings were that levels of aspiration, mobility, and persistence continued to affect the number of women in various levels of educational administration. The primary intent for both groups was to obtain certification in order to be employed as a school administrator. However, females were influenced by gender-specific reasons. Men's primary reason for obtaining certification was to enter the field of educational administration and move across the salary scale. Women listed convenient location and moving across the salary scale as their top two influences. More men than women indicated the superintendency was their ultimate career goal. Earlier research has confirmed the fact that women who enter programs of educational administration have lower career aspirations than men (Estler, Gross & Trask, & Howe in Shepard, 1999). This limits the number of females that can be considered as potential administrative candidates.

Women Succeeding in School Leadership

Instead of focusing on the lack of access to school leadership positions, the lack of support from mentors or networks, the absence of role models, attitudes toward power and leadership, or the demands of family life, Brunner (1997) focused on the gender related ways females have succeeded in the field. Seven gender-specific ways of succeeding were identified by the participants of the study. Women administrators need to balance two sets of expectations—role related and gender related. They need to keep their agendas simply in order to focus on their primary focus—the care of children, specifically academic achievement. Women administrators need to continue to communicate in a feminine manner, but at the same time be heard in a masculine culture. They must realize that the old myth of acting like a man in a man's role doesn't work. Women administrators must remove, or let go of, things that block their success. They need to be risk-takers with a "can do" attitude, but realize when they are faced with the impossible, and make plans for that occasion. Lastly, women administrators need to share power and credit.

Rural female principals in Nebraska were interviewed to highlight their positive experiences as school principals (Grady, Peery, & Krumm, 1997). Themes of the interviews were the importance of leadership and people skills, love of watching children grow and learn, the positive influence of effective mentors, the importance of support from superintendents, the fact that women have to work harder and be better at their jobs than do men, and the importance of family support.

Finally, Logan (1998) asserts that now is the time for more women to be successful as school administrators. She believes specific conditions exist that affect educational administration and have potential for redirecting hiring practices. More women could become school administrators as a result of these changes. One of the changes that is taking place deals with school site governance structures that emphasize local accountability for student achievement. Also, leadership skills now focus on collaboration, consensus building, and empowerment of others. An increasing number of national vacancies in school administration and a dwindling pool of applicants create high-demand conditions for qualified aspiring school leaders. Anti-discrimination legislation has resulted in a more open environment for hiring women in non-traditional roles. At least half of educational administration program enrollments since the mid-80s has been made up of women. Lastly, an increase in the percentages of women serving as professors in educational administration programs, and mentoring programs for aspiring school leaders, have provided role models that validate school administration as a career choice for women.

Recommendations

Research points to the fact that one of the most effective ways to recruit individuals for leadership positions is to first look within the organization. Research on women in school leadership advocates this approach, since many women do not wish to relocate in order to take a leadership position. Additionally, since the majority of women teach at the elementary level, more leadership opportunities here should be made available. Many researchers point to the effectiveness of aspiring principal programs.

Although perceptions of a woman's ability to lead a school are changing, many still perceive women as lacking the necessary skills in school finance, building maintenance, or school discipline.

Many women studied reported feeling the "good old boy" network hindered their ability to obtain leadership positions, and they felt discriminated against. Researchers call for support for women entering educational leadership from those already practicing in the field. Mentoring is one way to give aspiring and newly hired school leaders that support—for both women and men.

Women make up half of the enrollments across the nation in preparation programs for school leadership. Researchers advocate that a broad range of leadership theory be taught in preparation programs that focus on the strengths both men and women bring to leadership roles. An awareness of gender differences should be integrated in the curriculum. And since recruitment of women in to leadership preparation programs is not an issue any longer, the focus should now be on improving the hiring environment for women.

Summary

Leadership of today's schools must focus on improvement of teaching and student learning. More than ever, schools, their leaders and teachers, and even students are being held accountable for the learning that takes place. The current shortage of highly qualified school leaders has far reaching effects on the advancement of student achievement. Communities, school personnel, and those responsible for making policies can contribute to improvement of conditions in order to attract highly qualified individuals into school leadership positions. In this shortage environment it is important to develop local teacher leaders, provide them with leadership experiences, and support them in the advancement of their careers, with hope that they will become the school leaders of tomorrow.

Overall, this report covered the following topics and included suggestions listed below (adapted in part from *Leadership for Student Learning: Reinventing the Principalship*, 2000).

1. Effective school leaders should be provided by:

- raising entry and exit standards of preparation programs
- exploring alternate paths to leadership positions for capable leaders
- improving recruitment practices, specifically prepare local teacher leaders for eventual leadership positions
- increasing the number of women and minorities in school leadership positions—specifically put more women into leadership in secondary principalship and in the superintendency, more minorities in leadership positions other than in urban schools
- connecting the daily realities and needs of schools, with hands-on leadership opportunities in the design of preparation programs for educational leadership

2. The profession should be supported by:

- emphasizing leadership for student learning in preparation programs and in professional development
- improving on-going training
- providing networks and mentors for school leaders
- improving salaries and recognition in order to attract and retain the best candidates for the job
- restructuring the job to allow accommodation of leader strengths, interests, and limitations, since many view school leadership positions as not "doable"
- giving school leaders the needed amount of autonomy and authority
- improving conditions for school leaders' portability of their professional skills and credentials without loss of retirement benefits and encourage effective school leaders to remain on the job

3. Quality and results should be guaranteed by:

- focusing recruitment and retention efforts on leadership for student learning
- improving leader evaluation practices designed to generate information for professional growth and school improvement
- holding leaders accountable for their role in improving student learning by establishing rigorous and fair systems
- developing high standards for school leaders and more rigorous means of credentialing them

Shortage of Qualified School Leaders in Montana

Almost every survey of school leaders in Montana indicates there is, and will be to a greater extent, a shortage of school leaders in the state. One indicator of that shortage is the number of administrators that will be retiring. According to the certificates issued in the state of Montana during 1996-97, within 10 years nearly 50% of the principals and 60% of the superintendents will be new to their position, since many of the current administrators are likely to have retired by 2007 (OPI, 1999). The Montana School Boards Association (1999) sponsored a study focused on the shortage of qualified principals and superintendents in the state. The study found that of the 105 responding superintendents, 50% were planning on retiring within the next five years. Of the 126 principals, 26% were planning on retiring within the same time period.

Problems in Hiring

Of the 73 school board chairs and of the 67 superintendents who had hired administrators in the last three years, only 20 school board chairs and 10 superintendents indicated having no problems in filling the open positions (Montana School Boards Association, 1999). Most often, board

chairs and superintendents indicated the pool of applicants was too small, or individuals in the pool were not well qualified.

The Montana Statewide Education Profile, published by the Office of Public Instruction (2001) reports that in the 1998-99 school year, school districts were beginning to experience more difficulty filling teaching and administrative positions than in the past. Another indication that teacher and administrator positions would get more and more difficult to fill was the drop in the number of initial teacher certifications issued by OPI from 1996-97 to 1998-99. There was a 6% decline in the number of certificates issued during that time period.

However, a recent study conducted by the Certification Standards and Practices Advisory Council of the Montana Board of Public Education found that of the 354 school systems with accredited schools who filed fall reports for the 1999-2000 school year, only 5% indicated they found the principal position hard to fill during the last five years (Nielson, 2001). Only 2% indicated it was difficult to fill a superintendent position during that time period.

Individuals Qualified for Administrative Positions But Not Working in the Position

Most of the respondents in a study of individuals qualified for administrative jobs, but not currently working in administrative positions indicated they were from the most populated areas in the state (Montana School Boards Association, 1999). Relocation issues along with salary issues, were contributing reasons why these individuals decided not to pursue or take administrative positions outside of their communities. These individuals indicated that 54% of them planned to apply for administrative positions in the future, but most indicated they had not yet decided when they would apply. The next most common response was they would apply within the next two years.

Comparison of Best Practice to Current Practice in Montana

The report included information comparing national research to what is being done in Montana throughout the six major topics found in the report. Major findings in this section can be read in the Executive Summary. Comparisons of best practice to current practice in Montana can also be read throughout the report at the end of each topic.

Recommendations for the Region

A report issued by the Northwest Regional Laboratory, (Wolverton, et al., 2001) which focused on the shortage of qualified superintendents in the region, made specific recommendations based on their study of the region's superintendents. States studied were Alaska, Idaho, Montana, Oregon, and Washington. The report studied responses from 522 superintendents and 658 superintendent certificate holders who were not currently superintendents in the region. Researchers concluded that the gap between positions available and applicants in the northwest region will, in all likelihood, widen rather than shrink in the future. Based on the study's findings, recommendations are to:

- **Establish district and statewide mentor programs, scholarships, fellowships, and sponsorship programs for potential applicants, especially for under-represented groups—women and minorities.** Teacher leaders should be identified early in their careers, provided with shadowing experiences and release time to pursue credentialing.

- **Create region-wide superintendent exchange programs.** Restrictive retirement plans can be used to the benefit of the region, if not the state. States should consider retirement system modifications that encourage superintendents to remain on the job beyond the current retirement age.
- **Alert future teachers to the possibilities of administrative leadership while they are still in their teacher preparation programs.** This could be done by adding leadership courses to their programs.

Finally a report for the Certification Standards and Practices Advisory Council of the Montana Board of Public Education, that focused on the shortage of teachers in Montana, issued possible strategies that may have an impact in reducing the amount of teacher shortages the state faces (Nielson, 2001). These strategies may also be applied to the shortage of school administrators in the state. Possible strategies are:

- Identify the qualities that make Montana a great place to live and teach, and formally market them.
- Designate an official statewide teacher job listing center or linked centers.
- Design transition programs for people with degrees outside of education.
- Establish portable salaries and benefits.
- Identify the pool of potential applicants that could fill available jobs and tailor incentives to attract them.
- Formally acknowledge, at a high state policy level, that low salaries for teachers have created a crisis for Montana children, communities, and schools, and commit to dealing with the problem.
- Improve the retirement structure to keep teachers beyond 25 years, or to keep them teaching part-time after retirement.
- Provide support for student loan payments to attract new teachers and to keep teachers already in the system.
- Designate regional centers for teacher support and services.
- Formally establish criteria and identify shortage areas by . . . district size, student demographics, and geographic areas.
- Support and expand current internship programs that train certified staff on the job to switch over to shortage areas.
- Develop new and innovative internship programs for shortage areas.
- Support and expand collaborative efforts among school districts.

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Appendices

Appendix A: Standards
Appendix B: Proficiencies for Principals
Appendix C: State Law

Appendix A

Contents:

ISSLC Standards
NCATE Standards for Educational Leadership Program Accreditation
Montana Standards for Educational Leadership Program Accreditation

Interstate School Leaders Licensure Consortium: Standards for School Leaders

Standard I

A school administrator is an educational leader who promotes the success of all students by facilitating the development, articulation, implementation, and stewardship of a vision of learning that is shared and supported by the school community.

KNOWLEDGE
The administrator has knowledge and understanding of:
- learning goals in a pluralistic society
- the principles of developing and implementing strategic plans
- systems theory
- information sources, data collection, and data analysis strategies
- effective communication
- effective consensus-building and negotiation skills

DISPOSITIONS
The administrator believes in, values, and is committed to:
- the educability of all
- a school vision of high standards of learning
- continuous school improvement
- the inclusion of all members of the school community
- ensuring that students have the knowledge, skills, and values needed to become successful adults
- a willingness to continuously examine one's own assumptions, beliefs, and practices
- doing the work required for high levels of personal and organizational performance

PERFORMANCES
The administrator facilitates processes and engages in activities ensuring that:
- the vision and mission of the school are effectively communicated to staff, parents, students, and community members
- the vision and mission are communicated through the use of symbols, ceremonies, stories, and similar activities
- the core beliefs of the school vision are modeled for all stakeholders
- the vision is developed with and among stakeholders
- the contributions of school community members to the realization of the vision are recognized and celebrated
- progress toward the vision and mission is communicated to all stakeholders
- the school community is involved in school improvement efforts
- the vision shapes the educational programs, plans, and activities
- the vision shapes the educational programs, plans, and actions
- an implementation plan is developed in which objectives and strategies to achieve the vision and goals are clearly articulated
- assessment data related to student learning are used to develop the school vision and goals
- relevant demographic data pertaining to students and their families are used in developing the school mission and goals
- barriers to achieving the vision are identified, clarified, and addressed
- needed resources are sought and obtained to support the implementation of the school mission and goals
- existing resources are used in support of the school vision and goals
- the vision, mission, and implementation plans are regularly monitored, evaluated, and revised

Interstate School Leaders Licensure Consortium: Standards for School Leaders

Standard 2

A school administrator is an educational leader who promotes the success of all students by advocating, nurturing, and sustaining a school culture and instructional program conducive to student learning and staff professional growth.

KNOWLEDGE
The administrator has knowledge and understanding of:
- student growth and development
- applied learning theories
- applied motivational theories
- curriculum design, implementation, evaluation, and refinement
- principles of effective instruction
- measurement, evaluation, and assessment strategies
- diversity and its meaning for educational programs
- adult learning and professional development models
- the change process for systems, organizations, and individuals
- the role of technology in promoting student learning and professional growth
- school cultures

DISPOSITIONS
The administrator believes in, values, and is committed to:
- student learning as the fundamental purpose of schooling
- the proposition that all students can learn
- the variety of ways in which students can learn
- life long learning for self and others
- professional development as an integral part of school improvement
- the benefits that diversity brings to the school community
- a safe and supportive learning environment
- preparing students to be contributing members of society

PEFORMANCES
The administrator facilitates processes and engages in activities ensuring that:
- all individuals are treated with fairness, dignity, and respect
- professional development promotes a focus on student learning consistent with the school vision and goals
- students and staff feel valued and important
- the responsibilities and contributions of each individual are acknowledged
- barriers to student learning are identified, clarified, and addressed
- diversity is considered in developing learning experiences
- life long learning is encouraged and modeled
- there is a culture of high expectations for self, student, and staff performance
- technologies are used in teaching and learning
- student and staff accomplishments are recognized and celebrated
- multiple opportunities to learn are available to all students
- the school is organized and aligned for success
- curricular, co-curricular, and extra-curricular programs are designed, implemented, evaluated, and refined

- curriculum decisions are based on research, expertise of teachers, and the recommendations of learned societies
- the school culture and climate are assessed on a regular basis
- a variety of sources of information is used to make decisions
- student learning is assessed using a variety of techniques
- multiple sources of information regarding performance are used by staff and students
- a variety of supervisory and evaluation models is employed
- pupil personnel programs are developed to meet the needs of students and their families

Interstate School Leaders Licensure Consortium: Standards for School Leaders

Standard 3

A school administrator is an educational leader who promotes the success of all students by ensuring management of the organization, operations, and resources for a safe, efficient, and effective learning environment.

KNOWELDGE
The administrator has knowledge and understanding of:
- theories and models of organizations and the principles of organizational development
- operational procedures at the school and district level
- principles and issues relating to school safety and security
- human resources management and development
- principles and issues relating to fiscal operations of school management
- principles and issues relating to school facilities and use of space
- legal issues impacting school operations
- current technologies that support management functions

DISPOSITIONS
The administrator believes in, values, and is committed to:
- making management decisions to enhance learning and teaching
- taking risks to improve schools
- trusting people and their judgments
- accepting responsibility
- high quality standards, expectations, and performances
- involving stakeholders in management processes
- a safe environment

PERFORMANCES
The administrator facilitates processes and engages in activities ensuring that:
- knowledge of learning, teaching, and student development is used to inform management decisions
- operational procedures are designed and managed to maximize opportunities for successful learning
- emerging trends are recognized, studied, and applied as appropriate
- operational plans and procedures to achieve the vision and goals of the school are in place
- collective bargaining and other contractual agreements related to the school are effectively managed
- the school plant, equipment, and support systems operate safely, efficiently, and effectively
- time is managed to maximize attainment of organizational goals
- potential problems and opportunities are identified
- problems are confronted and resolved in a timely manner
- financial, human, and material resources are aligned to the goals of schools
- the school acts entrepreneurally to support continuous improvement
- organizational systems are regularly monitored and modified as needed
- stakeholders are involved in decisions affecting schools
- responsibility is shared to maximize ownership and accountability
- effective problem-framing and problem-solving skills are used
- effective conflict resolution skills are used
- effective group-process and consensus-building skills are used

- effective communication skills are used
- there is effective use of technology to manage school operations
- fiscal resources of the school are managed responsibly, efficiently, and effectively
- a safe, clean, and aesthetically pleasing school environment is created and maintained
- human resource functions support the attainment of school goals
- confidentiality and privacy of school records are maintained

Interstate School Leaders Licensure Consortium: Standards for School Leaders

Standard 4

A school administrator is an educational leader who promotes the success of all students by collaborating with families and community members, responding to diverse community interests and needs, and mobilizing community resources.

KNOWLEDGE
The administrator has knowledge and understanding of:
- emerging issues and trends that potentially impact the school community
- the conditions and dynamics of the diverse school community
- community resources
- community relations and marketing strategies and processes
- successful models of school, family, business, community, government and higher education partnerships

DISPOSITIONS
The administrator believes in, values, and is committed to:
- schools operating as an integral part of the larger community
- collaboration and communication with families
- involvement of families and other stakeholders in school decision-making processes
- the proposition that diversity enriches the school
- families as partners in the education of their children
- the proposition that families have the best interests of their children in mind
- resources of the family and community needing to be brought to bear on the education of students
- an informed public

PERFORMANCES
The administrator facilitates processes and engages in activities ensuring that:
- high visibility, active involvement, and communication with the larger community is a priority
- relationships with community leaders are identified and nurtured
- information about family and community concerns, expectations, and needs is used regularly
- there is outreach to different business, religious, political, and service agencies and organizations
- credence is given to individuals and groups whose values and opinions may conflict
- the school and community serve one another as resources
- available community resources are secured to help the school solve problems and achieve goals
- community youth family services are integrated with school programs
- community stakeholders are treated equitably
- diversity is recognized and valued
- effective media relations are developed and maintained
- a comprehensive program of community relations is established
- public resources and funds are used appropriately and wisely
- community collaboration is modeled for staff
- opportunities for staff to develop collaborative skills are provided
- partnerships are established with area businesses, institutions of higher education, and community groups to strengthen programs and support school goals

Interstate School Leaders Licensure Consortium: Standards for School Leaders

Standard 5

A school administrator is an educational leader who promotes the success of all students by acting with integrity, fairness, and in an ethical manner.

KNOWELDEGE
The administrator has knowledge and understanding of:
- the purpose of education and the role of leadership in modern society
- the values of the diverse school community
- professional codes of ethics
- various ethical frameworks and perspectives
- on ethics
- the philosophy and history of education

DISPOSITIONS
The administrator believes in, values, and is committed to:
- the ideal of the common good
- the principles in the Bill of Rights
- the right of every student to a free, quality education
- bringing ethical principles to the decision-making process
- subordinating one's own interest to the good of the school community
- accepting the consequences for upholding one's principles and actions
- using the influence of one's office constructively and productively in the service of all students and their families
- development of a caring school community

PERFORMANCES
The administrator:
- examines personal and professional values
- demonstrates a personal and professional code of ethics
- demonstrates values, beliefs, and attitudes that inspire others to higher levels of performance
- serves as a role model
- accepts responsibility for school operations
- considers the impact of one's administrative practices on others
- uses the influence of the office to enhance the educational program rather than for personal gain
- treats people fairly, equitably, and with dignity and respect
- protects the rights and confidentiality of students and staff
- demonstrates appreciation for and sensitivity to the diversity in the school community
- recognizes and respects the legitimate authority of others
- examines and considers the prevailing values of the diverse school community
- expects that others in the school community will demonstrate integrity and exercise ethical behavior
- opens the school to public scrutiny
- fulfills legal and contractual obligations
- applies laws and procedures fairly, wisely, and considerately

Interstate School Leaders Licensure Consortium: Standards for School Leaders

Standard 6

A school administrator is an educational leader who promotes the success of all students by understanding, responding to, and influencing the larger political, social, economic, legal, and cultural context.

KNOWELDGE
The administrator has knowledge and understanding of:
- principles of representative governance that undergird the system of American schools
- the role of public education in developing and renewing a democratic society and an economically productive nation
- the law as related to education and schooling
- the political, social, cultural and economic systems and processes that impact schools
- models and strategies of change and conflict resolution as applied to the larger political, social, cultural and economic contexts of schooling
- social, cultural and economic contexts of schooling
- global issues and forces affecting teaching and learning
- the dynamics of policy development and advocacy under our democratic political system
- the importance of diversity and equity in a democratic society

DISPOSITIONS
The administrator believes in, values, and is committed to:
- education as a key to opportunity and social
- actively participating in the political and policy making context in the service of education
- recognizing a variety of ideas, values, and cultures
- importance of a continuing dialogue with other decision makers affecting education
- using legal systems to protect student rights and improve student opportunities

PERFORMANCES
The administrator facilitates processes and engages in activities ensuring that:
- the environment in which schools operate is influenced on behalf of students and their families
- communication occurs among the school community concerning trends, issues, and potential changes in the environment in which schools operate
- there is ongoing dialogue with representatives of diverse community groups
- the school community works within the framework of policies, laws, and regulations enacted by local, state, and federal authorities
- public policy is shaped to provide quality education for students
- lines of communication are developed with decision makers outside the school community

Educational Leadership
NCATE
PROGRAM STANDARDS

AREA I. STRATEGIC LEADERSHIP: The knowledge, skills and attributes to identify contexts, develop with others vision and purpose, utilize information, frame problems, exercise leadership processes to achieve common goals, and act ethically for educational communities.

1. Professional and Ethical Leadership
The institution's program prepares school leaders who demonstrate an understanding of, and the capability to:

1.1 Facilitate the development and implementation of a shared vision and strategic plan for the school or district that focuses on teaching and learning (e.g. cultivate group norms, influence institutional culture, and affirm core values.)

1.2 Use motivational theory to create conditions that motivate staff, students and families to achieve the school's vision (e.g. facilitate collegiality and teamwork, arrange significant work, encourage challenging standards, provide autonomy, support innovation, delegate responsibility, develop leadership in others, provide leadership opportunities, recognize and reward effective performance, provide knowledge of results, provide coaching and mentoring, gain resources, serve as a role model)

1.3 Frame, analyze, and resolve problems using appropriate problem solving techniques and decision making skills (e.g. identify problem, seek and analyze problem factors, collect and organize relevant information, identify causes, seek creative solutions, apply ethical standards, determine best solution with others when appropriate).

1.4 Initiate, manage, and evaluate the change process.

1.5 Identify and critique several theories of leadership and their application to various school environments.

1.6 Act with a reasoned understanding of major historical, philosophical, ethical, social and economic influences affecting education in a democratic society.

1.7 Manifest a professional code of ethics and values.

2. Information Management and Evaluation
The institution's program prepares school leaders who demonstrate an understanding of, and the capability to:

2.1 Conduct needs assessment by collecting information on the students; on staff and the school environment; on family and community values, expectations and priorities; and on national and global conditions affecting schools.

2.2 Use qualitative and quantitative data to inform decisions, to plan and assess school programs, to design accountability systems, to plan for school
improvement, and to develop and conduct research.

2.3 Engage staff in an ongoing study of current best practices and relevant research and demographic data, and analyze their implications for school improvement.

2.4 Analyze and interpret educational data, issues, and trends for boards, committees, and other groups, outlining possible actions and their implications.

AREA II. INSTRUCTIONAL LEADERSHIP: The knowledge, skills and attributes to design with others appropriate curricula and instructional programs, to develop learner centered school cultures, to assess outcomes, to provide student personnel services, and to plan with faculty professional development activities aimed at improving instruction.

3. Curriculum, Instruction, Supervision, and the Learning Environment
The institution's program prepares school leaders who demonstrate an understanding of, and the capability to:

3.1 Create with teachers, parents and students a positive school culture that promotes learning; (e.g. holds high expectations, focuses on accomplishments and recognition, and promotes a supportive climate).

3.2 Develop collaboratively a learning organization that supports instructional improvement, builds an appropriate curriculum, and incorporates best practice.

3.3 Base curricular decisions on research, applied theory, informed practice, the recommendations of learned societies, and state and federal policies and mandates. (e.g. cognitive development, human development, learning styles, contemporary methodologies, content priorities, special needs legislation on topics such as least restrictive environment, etc.).

3.4 Design curricula with consideration for philosophical, sociological, and historical foundations, democratic values, and the community's values, goals, social needs and changing conditions.

3.5 Align curricular goals and objectives with instructional goals and objectives and desired outcomes when developing scope, sequence, balance, etc.

3.6 Develop with others curriculum and instruction appropriate for varied teaching and learning styles and specific student needs based on gender, ethnicity, culture, social class and exceptionalities.

3.7 Utilize a variety of supervisory models to improve teaching and learning (e.g. clinical, developmental, cognitive and peer coaching, as well as applying
observation and conferencing skills).

3.8 Use various staffing patterns, student grouping plans, class scheduling forms, school organizational structures, and facilities design processes, to support various teaching strategies and desired student outcomes.

3.9 Assess student progress using a variety of appropriate techniques.

4. Professional Development and Human Resources
The institution's program prepares school leaders who demonstrate an understanding of, and the capability to:

4.1 Work with faculty and other stakeholders to identify needs for professional development, to organize, facilitate, and evaluate professional development programs, to integrate district and school priorities, to build faculty as resource, and to ensure that professional development activities focus on improving student outcomes.

4.2 Apply adult learning strategies to professional development, focusing on authentic problems and tasks, and utilizing mentoring, coaching, conferencing
and other techniques to ensure that new knowledge and skills are practiced in the workplace.

4.3 Apply effective job analysis procedures, supervisory techniques and performance appraisal for instructional and non-instructional staff.

4.4 Formulate and implement a self-development plan, endorsing the value of career-long growth, and utilizing a variety of resources for continuing professional development.

4.5 Identify and apply appropriate policies, criteria and processes for the recruitment, selection, induction, compensation and separation of personnel, with attention to issues of equity and diversity.

4.6 Negotiate and manage effectively collective bargaining or written agreements.

5. Student Personnel Services
The institution's program prepares school leaders who demonstrate an understanding of, and the capability to:

5.1 Apply the principles of student growth and development to the learning environment and the educational program.

5.2 Develop with the counseling and teaching staff a full program of student advisement, counseling, and guidance services.

5.3 Develop and administer policies that provide a safe school environment and promote student health and welfare.

5.4 Address student and family conditions affecting learning by collaborating with community agencies to integrate health, social, and other services for students.

5.5 Plan and manage activity programs to fulfill student developmental, social, cultural, athletic, leadership and scholastic needs; working with staff, students, families, and community.

AREA III. ORGANIZATIONAL LEADERSIHP: The knowledge, skills and attributes to understand and improve the organization, implement operational plans, manage financial resources, and apply decentralized management processes and procedures.

6. Organizational Management
The institution's program prepares school leaders who demonstrate an understanding of, and the capability to:

6.1 Establish operational plans and processes to accomplish strategic goals, utilizing practical applications of organizational theories.

6.2 Apply a systems perspective, viewing schools as interactive internal systems operating within external environments.

6.3 Implement appropriate management techniques and group processes to define roles, assign functions, delegate effectively, and determine accountability for attaining goals.

6.4 Monitor and assess the progress of activities, making adjustments and formulating new action steps as necessary.

7. Interpersonal Relationships
The institution's program prepares school leaders who demonstrate an understanding of, and the capability to:

7.1 Use appropriate interpersonal skills (e.g. exhibiting sensitivity, showing respect and interest, perceiving needs and concerns, showing tact, exhibiting consistency and trustworthiness, etc.).

7.2 Use appropriate written, verbal, and nonverbal communication in a variety of situations.

7.3 Apply appropriate communications strategies (e.g. identifying audiences, determining messages, selecting transmission mediums, identifying reaction
of receivers, soliciting responses, etc.).

7.4 Promote multicultural awareness, gender sensitivity, and racial and ethnic appreciation.

7.5 Apply counseling and mentoring skills, and utilize stress management and conflict management techniques.

8. Financial Management and Resource Allocation
The institution's program prepares school leaders who demonstrate an understanding of, and the capability to:

8.1 Identify and analyze the major sources of fiscal and non-fiscal resources for schools and school districts.

8.2 Acquire and manage financial and material assets, and capital goods and services, allocating resources according to district or school priorities (e.g. property, plant, equipment, transportation, and food service.).

8.3 Develop an efficient budget planning process that is driven by district and school priorities and involves staff and community.

8.4 Perform budget management functions including financial planning, monitoring, cost control, expenditures accounting, and cash flow management.

9. Technology and Information Systems

The institution's program prepares school leaders who demonstrate an understanding of, and the capability to:

9.1 Use technology, telecommunications and information systems to enrich curriculum and instruction (e.g. CAI systems, CD ROM retrieval systems, on-line networks, distance learning, interactive video, etc.).

9.2 Apply and assess current technologies for school management and business procedures.

9.3 Develop and monitor long range plans for school and district technology and information systems, making informed decisions about computer hardware and software, and about staff development, keeping in mind the impact of technologies on student outcomes and school operations.

AREA IV. POLITICAL AND COMMUNITY LEADERSHIP: The knowledge, skills and attributes to act in accordance with legal provisions and statutory requirements, to apply regulatory standards, to develop and apply appropriate policies, to be conscious of ethical implications of policy initiatives and political actions, to relate public policy initiatives to student welfare, to understand schools as political systems, to involve citizens and service agencies, and to develop effective staff communications and public relations programs.

10. Community and Media Relations
The institution's program prepares school leaders who demonstrate an understanding of, and the capability to:

10.1 Analyze community and district power structures, and identify major opinion leaders and their relationships to school goals and programs.

102 Articulate the district's or school's vision, mission and priorities to the community and media, and build community support for district or school priorities and programs (e.g. form collaborative relationships with businesses, citizen groups, neighborhood associations, social service agencies, parent organizations, advocacy groups, universities, and religious institutions, etc.).

10.3 Communicate effectively with various cultural, ethnic, racial, and special interest groups in the community.

10.4 Involve family and community in appropriate policy development, program planning, and assessment processes.

10.5 Develop an effective and interactive staff communications plan and public relations program.

10.6 Utilize and respond effectively to electronic and printed news media.

11. Educational Law, Public Policy and Political Systems
The institution's program prepares school leaders who demonstrate an understanding of, and the capability to:

11.1 Apply knowledge of federal and state constitutional, statutory and regulatory provisions and judicial decisions governing education.

11.2 Apply knowledge of common law and contractual requirements and procedures in an educational setting (e.g. tort liability, contract administration, formal hearings).

11.3 Define and relate the general characteristics of internal and external political systems as they apply to school settings.

11.4 Describe the processes by which federal, state, district, and school-site policies are formulated, enacted, implemented and evaluated, and develop strategies for influencing policy development.

11.5 Make decisions based on the moral and ethical implications of policy options and political strategies.

11.6 Analyze the major philosophical tenets of contemporary intellectual movements and analyze their effect on school contexts (e.g. critical theory,
feminism, poststructuralism, fundamentalism, etc.).

11.7 Develop appropriate procedures and relationships for working with local governing boards.

AREA V. INTERNSHIP: The internship is defined as the process and product that result from the application in a workplace environment of the strategic, instructional, organizational and contextual leadership program standards. When coupled with integrating experiences through related clinics or cohort seminars, the outcome should be a powerful synthesis of knowledge and skills useful to practicing school leaders.

The internship includes a variety of substantial concurrent or capstone experiences in diverse settings planned and guided cooperatively by university and school district personnel for credit hours and conducted in schools and school districts over an extended period of time. The experiences need to provide interns with substantial responsibilities which increase over time in amount and complexity, and which involve direct interaction and involvement with students, staff, parents, and community leaders. Ideally, an internship should include some work with social service organizations involved with inter-agency activities affecting schools.

An acceptable internship would be a six-month, full time mentored experience (or the equivalent3), preferably involving two or more settings and multiple levels (elementary, secondary, etc.). An optimum internship would be a year-long, full time mentored experience.

Universities and school districts should collaborate to achieve state policies that support these program standards for the internship. School district, university and state policies and practices which encourage and facilitate paid internship positions allow interns to engage in a rich variety of mentored leadership activities and decision making responsibilities. These opportunities raise the level of professional preparation and provide evidence of a serious commitment to developing quality leadership for the nation's schools.

12. Internship
The internship provides significant opportunities in the workplace to synthesize and apply the knowledge, and to practice and develop the skills, identified in the eleven guideline areas. Therefore, the preparation program:

12.1 Requires a variety of substantial in-school/district experiences over an extended period of time in diverse settings, planned cooperatively and supervised by university and school district personnel.

12.2 Establishes relationships with school leaders acting as trained mentors/clinical professors who guide individuals preparing for school leadership in appropriate in-school/district experiences.

12.3 Includes experiences with social service, private, and/or community organizations.

Professional Educator Preparation Program Standards and Procedures
Montana Board of Public Education
2000

10.58.704 SCHOOL PRINCIPALS AND SUPERINTENDENTS (1) For the prospective administrator the program shall include instruction leading toward competency in:
(a) designing, implementing and evaluating a school climate improvement program which includes mutual efforts by trustees, staff, parents, community members, and students to formulate and attain school goals. This competency shall include knowledge and skills in the following:
(1) human relations, organizational development, and leadership skills;
(ii) collaborative goal setting and action planning;
(iii) organizational and personal planning and time management;
(iv) participative management, variations in staffing;
(v) climate assessment methods and skills;
(vi) gender, multi-cultural and ethnic understanding; and
(vii) group process, interpersonal communication, and motivational skills.
(b) political theory and application of political skills in building local, state, and national support for education. This competency shall include knowledge and skills in the following:
(i) school and community public relations, coalition building, and related public service activities;
(ii) politics of school governance and operations;
(iii) political strategies to gain authorization for voted levies, building reserve funds, bond issues and other referenda;
(iv) lobbying, negotiating, collective bargaining, policy development and policy maintenance skills to assure successful educational programs;
(v) role and function of mass media in shaping and forming opinions; and
(vi) conflict mediation and the skills to accept and cope with inherent controversies.
(c) developing a systematic school curriculum that assures both extensive cultural enrichment, creative and technological activities, and mastery of problem solving. This shall include knowledge and skills in the following:
(i) planning methods to anticipate occupational trends and their educational implications;
(ii) taxonomies of instructional objectives and validation procedures for curriculum units and sequences;
(iii) theories of cognitive development and the sequencing and structuring of curricula;
(iv) development and application of valid and reliable performance indicators for instructional outcomes, including alternative methods of assessment;
(v) use of computers and other appropriate technologies; and
(vi) development and use of available cultural and community resources.
(d) planning and implementing an instructional management system which includes learning objectives, curriculum design, and instructional strategies and techniques that encourage high levels of achievement. This competency shall include knowledge and skills in the following:
(i) curriculum design and instructional delivery strategies;
(ii) instructional and motivational psychology; and
(iii) management of change to enhance the mastery of educational goals.
(e) designing staff development and evaluation systems to enhance effectiveness of educational personnel. This competency shall include knowledge and skills in the following:
(i) system and staff needs assessment to identify areas for concentrated staff development and resource allocation for new personnel;
(ii) use of system and staff evaluation data in personnel policy and decision-making;
(iii) appraisal of the effectiveness of staff development programming as it affects professional performance;
(iv) using effective supervision models as a staff improvement and evaluation strategy; and
(v) assessment of individual and institutional sources of stress and development of methods for managing that stress.

(f) allocating human, material, and financial resources to efficiently and accountably ensure successful student learning. This competency shall include knowledge and skills in the following:
(I) facilities planning, maintenance, and operation;
(ii) financial planning and cash flow management;
(iii) personnel administration;
(iv) pupil personnel services;
(v) legal concepts, regulations, and codes for school operation;
(vi) developing grant opportunities and effective grant writing skills; and
(vii) cost effectiveness and program budgeting.
(g) conducting research and using research finding in decision-making to improve long-range planning, school operations, and student learning. This competency shall include knowledge and skills in the following:
(i) research designs and methods including gathering, analyzing and interpreting data;
(ii) descriptive and inferential statistics;
(iii) evaluation and planning models and methods; and
(iv) selection, administration, and interpretation of evaluation instruments.
(h) understanding special education programs, Section 504 of the Rehabilitation Act, and the processes necessary for the management of such programs. The competency shall include knowledge and skills in the following:
(i) pre-referral and referral procedures;
(ii) intervention and inclusion programming; and
(iii) parental participation, their roles and rights.
(i) understand the purposes of, as well as the differences and interrelationships among, federal programs to include but not be limited to, elementary and secondary education act programs, Carl Perkins programs, Individuals with Disabilities Education Act part B and preschool, bilingual education, federal impact aid, USDA school food service programs, and subsequent variations. The competency shall include knowledge and skills in the following:
(i) finance, matching funds and maintenance of effort;
(ii) application, budgeting and evaluation procedures;
(iii) program administration;
(iv) program and fiscal accounting;
(v) reporting requirements;
(vi) legal issues; and
(vii) consortium formation.

Appendix B

Contents:

Proficiencies for Principals: National Association of Elementary School Principals
Proficiencies for Principals: National Association of Secondary School Principals

The National Association of Elementary School Principals' Proficiencies for Principals

The National Association of Elementary School Principals has devised Proficiencies for Principals that provide guidance and direction for the preparation and professional development of K-8 school principals. The Proficiencies are based upon both research concerning effective principals and the experience of practicing administrators. What results is a set of proficiencies that describe leadership and management skills and behaviors that effective principals need to demonstrate.

- Leadership Proficiencies. Effective principals are leaders of leaders who place as their highest priority the teaching and learning of students. They sustain a quality environment and act morally and ethically at every turn.

- Leadership Behavior: Proficient principals possess values, beliefs, and personal attributes that inspire others to achieve school goals, build a school environment that is marked by collegiality and common purpose, work collaboratively and innovatively, encourage shared decision-making, and recognize achievement among students and staff.

- Communication Skills: Proficient principals know how to project ideas and images, verbally, nonverbally, through technology, and in written communication. They also keep the school community informed about the school and interact with diverse groups of people with sensitivity and understanding.

- Group Processes: Proficient principals mobilize others to collaborate in solving problems and accomplishing school goals and capitalize upon the talents and expertise of others. They also understand the dynamics of change and effectively apply group process skills.

- Curriculum and Instruction: Proficient principals ensure that their school's curriculum is aligned with school goals, that it has been developed cooperatively, and that it is appropriately specific about knowledge, skills, values, habits, and attitudes that students should develop. They also seek support for the instructional program, ensure that instruction is appropriate and purposeful, and use staff expertise to promote a common core of learning.

- Assessment: Proficient principals monitor the school daily to ensure that program and service goals are being met. They also know the importance of evaluating student and staff performance, reinforce success and remediate failure, understand the sensitive nature of evaluation, and seek evaluation of their own performance.

- Administrative/Management Proficiencies. Effective principals possess strong organizational skills, manage fiscal resources well, and are effective at dealing with political pressures.

- Organizational Management: Proficient principals work with members of the school community to set the school's organizational goals and priorities, manage a wide variety of tasks and responsibilities, participate in professional development, participate in reflective thinking, and are open to change.

- Fiscal Management: Proficient principals understand the relationship between school goals and the budgeting process, creatively find resources to support school programs, and project future needs.

- Political Management: Proficient principals deal effectively with forces outside of school, generate public support for the school, are involved in a variety of civic activities, and have a practical

knowledge of local, state, and national political processes and their impact on the school.

The National Association of Secondary School Principals' Skills for Principals

Educational Leadership

- Setting Instructional Direction: Implementing strategies for improving teaching and learning, including putting programs and improvement efforts into action. Developing a vision and establishing clear goals; providing direction in achieving state goals; encouraging others to contribute to goal achievement; securing commitment to a course of action from individuals and groups.

- Teamwork: Seeking and encouraging involvement of team members. Modeling and encouraging the behaviors that move the group to task completion. Supporting group accomplishment.

- Sensitivity: Perceiving the needs and concerns of others; dealing tactfully with others in emotionally stressful situations or in conflict. Knowing what information to communicate and to whom. Relating to people of varying ethnic, cultural, and religious backgrounds.

Resolving Complex Problems

- Judgment: Reaching logical conclusions and making high-quality decisions based on available information. Giving priority and caution to significant issues. Seeking out relevant data, facts, and impressions. Analyzing and interpreting complex information.

- Results Orientation: Assuming responsibility. Recognizing when a decision is required. Taking prompt action as issues emerge. Resolving short-term issues while balancing them against long-term objectives.

- Organizational Ability: Planning and scheduling one's own and the work of others so that resources are used appropriately. Scheduling flow of activities; establishing procedures to monitor projects. Practicing time and task management; knowing what to delegate and to whom.

Communication

- Oral Communication: Clearly communicating. Making oral presentations that are clear and easy to understand.

- Written Communication: Expressing ideas clearly in writing; demonstrating technical proficiency. Writing appropriately for different audiences.

Developing Self and Others

- Development of Others: Teaching, coaching, and helping others. Providing specific feedback based on observations and data.

- Understanding Own Strengths and Weaknesses: Understanding personal strengths and weaknesses. Taking responsibility by actively pursuing developmental activities. Striving for continuous learning.

Appendix C

Contents:

Montana State Law--
Class 3 Administrative Certificate Requirements
Responsibilities of School Board Members

CLASS 3 (ADMINISTRATIVE) CERTIFICATE:

A. Term: 5 years renewable.
B. Basic education: Administrative coursework required for any of the following endorsements must be taken from accredited institutions with approved programs in the administrative area to be endorsed.
C. Test: Successful completion of the test for certification is required for initial issuance of the Class 3 certificate unless currently certified with the Class 1 or 2 certificate. Refer to A Basic Skills Tests for Certification.
D. Renewal: Verification of one year of successful experience, or the equivalent, in the area of endorsement, plus presentation of acceptable evidence of 60 renewal units, both earned during the valid term of the expiring certificate or by August 31 following the date of expiration.
E. Reinstatement: 8 semester (12 quarter) credits earned within the 5-year period immediately preceding the validation date of the reinstated certificate. Requirements must be met that are in force at the time of reinstatement. (See guidelines for Reinstatement of Lapsed Certificates or Recent Credit Requirement for Initial Certification, available from the Certification Division.)

F. Principal endorsement:
1. Master's degree in school administration, or the equivalent.
2. Must be eligible for Class 1 or 2 teaching certificate at the proper level.
3. Verification of a minimum of 3 years of successful experience as an appropriately certified and assigned teacher at the proper level.
4. At least 14 graduate semester (21 quarter) credits in education or the equivalent to include the following content:
a. General school administration
b. Specific area administration as appropriate (elementary or secondary)
c. Administration of guidance services
d. Supervision of instruction at the appropriate level
e. School curriculum at the appropriate level
f. Basic school finance
g. School law
5. When all requirements for principal are met as outlined above, the K-12 principal endorsement can be obtained upon completion of 6 graduate semester credits in educational leadership and curriculum at the level opposite the basic teacher preparation.

G. Superintendent endorsement:
1. Master's degree in school administration, or the equivalent.
2. Must be eligible for Class 1 or 2 teaching certificate.
3. Full eligibility for a principal endorsement in Montana (must include current core outlined for principal).
4. 8 graduate semester (12 quarter) credits beyond the master's degree. The following courses must be found in the graduate coursework:
a. School management and/or facilities planning
b. School negotiation
c. Advanced school finance
d. Public relations
5. 8 graduate semester (12 quarter) credits in elementary education to include elementary administration and elementary curriculum if endorsed at the secondary level; 8 graduate semester (12 quarter) credits in secondary education to include secondary administration and secondary

curriculum if endorsed at the elementary level.

6. Experience:

a. 1 year of administrative experience as an appropriately certified administrator (principal, assistant principal, supervisor), OR

b. 1 year of supervised internship as superintendent.

MCA -- Sept. 2000

20-3-324. Powers and duties. As prescribed elsewhere in this title, the trustees of each district shall:

(1) employ or dismiss a teacher, principal, or other assistant upon the recommendation of the district superintendent, the county high school principal, or other principal as the board considers necessary, accepting or rejecting any recommendation as the trustees in their sole discretion determine, in accordance with the provisions of Title 20, chapter 4;
(2) employ and dismiss administrative personnel, clerks, secretaries, teacher aides, custodians, maintenance personnel, school bus drivers, food service personnel, nurses, and any other personnel considered necessary to carry out the various services of the district;
(3) administer the attendance and tuition provisions and govern the pupils of the district in accordance with the provisions of the pupils chapter of this title;
(4) call, conduct, and certify the elections of the district in accordance with the provisions of the school elections chapter of this title;
(5) participate in the teachers' retirement system of the state of Montana in accordance with the provisions of the teachers' retirement system chapter of Title 19;
(6) participate in district boundary change actions in accordance with the provisions of the districts chapter of this title;
(7) organize, open, close, or acquire isolation status for the schools of the district in accordance with the provisions of the school organization part of this title;
(8) adopt and administer the annual budget or a budget amendment of the district in accordance with the provisions of the school budget system part of this title;
(9) conduct the fiscal business of the district in accordance with the provisions of the school financial administration part of this title;
(10) subject to 15-10-420, establish the ANB, BASE budget levy, over-BASE budget levy, additional levy, operating reserve, and state impact aid amounts for the general fund of the district in accordance with the provisions of the general fund part of this title;
(11) establish, maintain, budget, and finance the transportation program of the district in accordance with the provisions of the transportation parts of this title;
(12) issue, refund, sell, budget, and redeem the bonds of the district in accordance with the provisions of the bonds parts of this title;
(13) when applicable, establish, financially administer, and budget for the tuition fund, retirement fund, building reserve fund, adult education fund, nonoperating fund, school food services fund, miscellaneous programs fund, building fund, lease or rental agreement fund, traffic education fund, impact aid fund, interlocal cooperative agreement fund, and other funds as authorized by the state superintendent of public instruction in accordance with the provisions of the other school funds parts of this title;
(14) when applicable, administer any interlocal cooperative agreement, gifts, legacies, or devises in accordance with the provisions of the miscellaneous financial parts of this title;
(15) hold in trust, acquire, and dispose of the real and personal property of the district in accordance with the provisions of the school sites and facilities part of this title;
(16) operate the schools of the district in accordance with the provisions of the school calendar part of this title;
(17) establish and maintain the instructional services of the schools of the district in accordance with the provisions of the instructional services, textbooks, vocational education, and special education parts of this title;
(18) establish and maintain the school food services of the district in accordance with the provisions of the school food services parts of this title;
(19) make reports from time to time as the county superintendent, superintendent of public instruction, and board of public education may require;
(20) retain, when considered advisable, a physician or registered nurse to inspect the sanitary conditions of the school or the general health conditions of each pupil and, upon request, make available to

any parent or guardian any medical reports or health records maintained by the district pertaining to the child;
(21) for each member of the trustees, visit each school of the district not less than once each school fiscal year to examine its management, conditions, and needs, except trustees from a first-class school district may share the responsibility for visiting each school in the district;
(22) procure and display outside daily in suitable weather on school days at each school of the district an American flag that measures not less than 4 feet by 6 feet;
(23) provide that an American flag that measures approximately 12 inches by 18 inches be prominently displayed in each classroom in each school of the district, except in a classroom in which the flag may get soiled. This requirement is waived if the flags are not provided by a local civic group.
(24) adopt and administer a district policy on assessment for placement of any child who enrolls in a school of the district from a nonpublic school that is not accredited, as required in 20-5-110;
(25) upon request and in compliance with confidentiality requirements of state and federal law, disclose to interested parties school district student assessment data for any test required by the board of public education; and
(26) perform any other duty and enforce any other requirements for the government of the schools prescribed by this title, the policies of the board of public education, or the rules of the superintendent of public instruction.