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## TAKING ACTION GUIDE OVERVIEW

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Davis Campbell and Michael Fullan wrote *The Governance Core: School Boards, Superintendents, and Schools Working Together* out of the recognition that real and sustained change—the strengthening of the public-school system—can only happen with the full engagement and support of a well-functioning local governance system. In many instances, the missing link to successful implementation of education system change is the connection between governance and the two other major organizational functions of a school district: administration and curriculum/instruction.

In this guide, we provide learning processes, organizers, assessment tools, and a planning guide to help school boards and superintendents use and understand the key concepts in action, and to build common ground for improving core governance in their systems.

School district governance—how school boards and superintendents work together—is one of the most neglected and underappreciated, yet most important functions in education. *The Governance Core* goes to the heart of effective school district governance. The book spells out the fundamental, nonnegotiable elements of highly effective governance systems in local school districts and why they work.

The premise is simple. Our vision is of a dynamic, powerful governance system, school board, and superintendent working together as a cohesive, unified team with a common unity of purpose driven by a shared moral imperative. It is based upon Davis Campbell's forty years of work with boards and superintendents and the lessons from the international work of Michael Fullan on coherence, moral imperative, and system change. *The Governance Core* presents the elements of highly effective governance systems, elements that are evident in hundreds of high performing school districts. A truism: Not all governance systems are high performing, but all high performing school districts have highly effective governance.

The purpose of *The Taking Action Guide* is to take the essential characteristics of effective governance presented in *The Governance Core* and demonstrate how, through various learning processes and discussions, each concept can be implemented in individual or groups of school districts. What is evident from the book is that there are three primary characteristics of effective governance systems that are present in all high performing districts. These elements are themes that run throughout *The Taking Action Guide* and are essential. In these districts:

- There is a clear understanding that while governance is a separate, distinct organizational function with its own mindset, roles, and responsibilities, effective governance in action is an inseparable partner with administration and curriculum and instruction.
- The work of the board and superintendent is driven by a shared moral imperative that focuses on specific, precise strategic goals.
- The board and superintendent govern in a climate of coherence and collaboration.

There are six key elements underpinning these fundamental themes. Each in its own way is equally transformational.

1. Highly effective trustees govern with a well-developed governance mindset. Trustees with a governance mindset make the essential transition from campaigning to governing; from candidate to trustee. They are system thinkers with a strategic focus. Trustees with a governance mindset are deep learners; they recognize that to govern effectively they must understand the issues underpinning the moral imperative and the district's strategic goals. Equally important, they manage their public manner.
2. Superintendents take purposeful action to support the board and governance.
3. The board creates, sustains, and operates within a positive governance infrastructure and culture.
4. The board carries out its governance responsibilities in a collaborative way always recognizing that achieving the moral imperative is the real work of governance.
5. The board utilizes proven governance tools and strategies to create and sustain effective governance.
6. The board develops and implements a comprehensive plan to onboard new trustees: The plan focuses on listening and learning from and inviting new board members into the governance culture of coherence, the shared moral imperative, and strategic goals.

It is important to understand that these elements of effective governance do not exist in isolation. They interact in powerful ways that build a highly effective governance system. For example, understanding that governance is a distinct organizational function shapes and defines the specific functions and jobs of the board. It makes it clear that there are specific responsibilities and jobs for the board that only the board can perform. In high performing governance systems, the board is clear that to accomplish the board's critical functions, it must find common ground around a central core purpose, what we call the moral imperative. To relentlessly pursue that common purpose, the board must operate in a trusting, collaborative manner with a shared understanding of the core work of the district, what we call governing with coherence.

This *Taking Action Guide* provides, in an individual module format, a series of learning processes that assist boards and superintendents in developing the core competencies, procedures, and protocols that are critical to effective governance of high-quality education for all children. The stakes are high. We must not fail our children.

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## HOW TO USE THIS GUIDE

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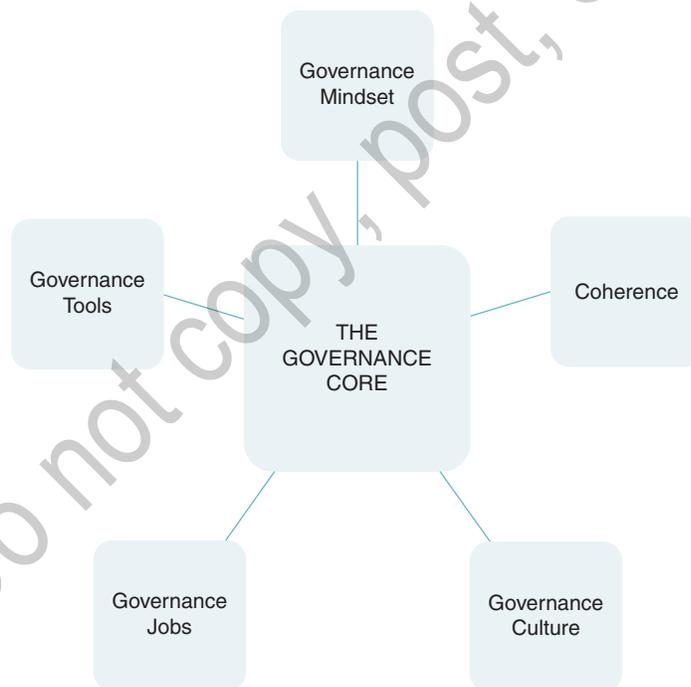
### Purpose

*The Taking Action Guide for Core Governance* contains eight modules based on the ideas and flow of the book. It is designed to assist trustees and superintendents through step-by-step learning processes that build knowledge and skills, resulting in a shared “Governance Core.” The Governance Core five components will guide the policies and action of the district as it develops and implements a shared moral commitment to serve all of its students and families.

It provides an opportunity to build *collective* as well as *individual* capacity through deep learning, honest and open conversation, and collaborative exploration of the concepts and strategies. It also fosters a common language to promote clarity and understanding.

The end result will be a stronger, more cohesive governance system that reflects the key concept of the Governance Core: a school board and superintendent working together as a unified team driven by a shared moral imperative.

**Figure 0.1** Governance Core Components



*Source:* Campbell and Fullan, 2019

### Getting Started

*The Taking Action Guide for Governance Core* may be used with a single school board or with a group of boards coming together to learn and share best practices.

Book study sessions may vary in length, but they are designed for one to two hours of in-depth discussion related to *The Governance Core: School Boards, Superintendents, and Schools Working Together* and reflection.

## Preparation

To begin, each member of the board should read *The Governance Core: School Boards, Superintendents, and Schools Working Together* (Davis & Fullan, 2019). Specific readings are provided for each of the Learning Processes. All page numbers listed in the Learning Processes in this *Taking Action Guide* refer to pages in *The Governance Core*.

Participants are encouraged to engage fully, share expertise and opinions, and commit to decisions and actions made by the board during the discussions.

To provide opportunities for all participants to be involved, it is highly recommended to use a facilitator who:

- creates a safe and inviting learning environment
- clarifies the work
- establishes norms for working together
- organizes the dates and times for sessions
- selects the most appropriate Learning Processes
- facilitates the Learning Processes
- asks probing questions and seeks clarifications during the discussion
- utilizes the Governance Core Progressions to plan and to measure progress
- initiates the planning process based on the work from Learning Processes in each module
- monitors the Governance Core Planning Guide
- communicates openly and frequently
- provides time and encourages reflections in the Personal Journal

## Learning Processes

To build the board's collective capacity, a series of Learning Processes are provided to analyze the components of the Governance Core. Learning Processes are powerful instructional strategies that engage participants and promote deep discussion. When learning new and challenging content, understanding, application, and retention increase dramatically if we discuss, experience, and teach others (Ekwall & Shanker, 1988).

Each Learning Process has a specific purpose, readings, a description of the process, directions, and advance organizers for summarizing content and reflections. The facilitator in collaboration with the board members may select those Learning Processes most appropriate and useful to the participants.

## Progressions

Progressions are provided to assess growth on the four components of the Governance Core model—Mindset, Coherence, Culture, and Jobs.

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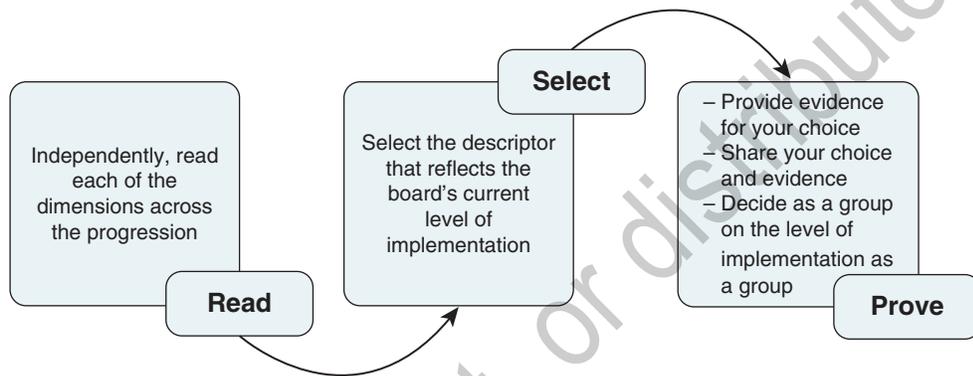
**“Progressions serve as an anchor for professional dialogue  
... and also as a monitoring and evaluating system.”**

***(Fullan & Quinn, 2018, p. 19)***

Each dimension is measured on a scale from Emerging to Accelerating to Mastering.

Using the progressions will help boards to assess the current status and to plan for growth. Board members will review each dimension and the descriptors for the three levels. They consider the level of implementation for each component and provide evidence for the descriptor that best describes the current status and will share their choices and evidence. The next step is to reach consensus on the level—Emerging, Accelerating, or Mastering—and plan accordingly to move the board to the next level.

**Figure 0.2.** Governance Core Progressions

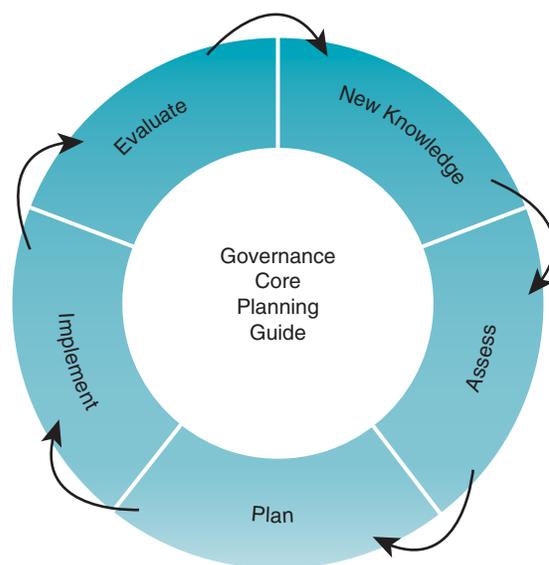


### Governance Core Planning Guide

Following each module, there is an opportunity to plan for the next steps of the journey using the Governance Core Planning Guide. The board determines appropriate areas of focus based on the knowledge gained from the Learning Processes and from the progression. In addition, the planning guide provides a format to outline specific actions, a person to take the lead, timelines, and indicators of success.

Boards should consider the development of a *Governance Handbook* to document their governance infrastructure, the district moral imperative, strategic priorities, governance roles and responsibilities, and operational protocols. It is a living document that the board will use, refer to, and update periodically. As the Governance Core Planning Guide progresses, consider the elements that could be incorporated in your *Governance Handbook* as suggested in Module 6.

**Figure 0.3** Planning Guide



### Personal Reflections

Each chapter includes an opportunity for Personal Reflection. Governance Team members are encouraged to think about the content and how they will support and move toward implementation of the Governance Core.

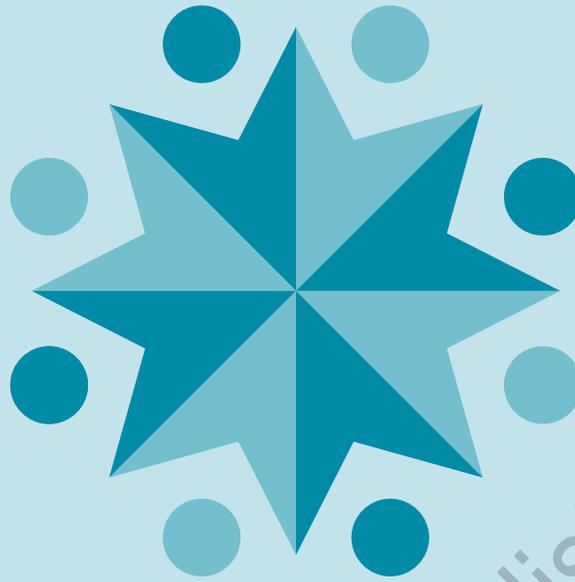
Sharing of your reflections is a personal choice, not an expectation. The reflections may guide personal contributions to the collective knowledge, skills, and attitudes as the board progresses toward the Governance Core model.

### Digital Possibilities

As a result of COVID-19, capacity-building has temporarily moved online in many jurisdictions. Despite these challenges, innovations continue to emerge as we learn how to connect, collaborate, and instruct in a remote environment. The eight modules in this guide and the activities within have been designed with this mind and should be viewed through a digital lens. They can be used both synchronously and asynchronously through video conferencing and Learning Management Systems. We encourage the reader to always be on the lookout for innovative pedagogical practices in the digital space.

## Module Content and Learning Processes At a Glance

GUIDE	MODULE	CONTENT	LEARNING PROCESS
PART I - MINDSETS FOR EFFICACY	Module 1 Moral Imperative and The Governance Core	Governance Core and Moral Imperative	1.1. Quote Share
		Personal Values and Beliefs	1.2. Quick Write
		Themes of Good Governance	1.3. Say Something
		Guidelines for Board Members	1.4. Think-Pair-Share
		Governance Highlights	1.5 The 3–2-1
	Module 2 Governance Mindset	Importance of Governance Mindset	2.1. Governance Mindset Reflection
		Elements of Governance	2.2. Jigsaw
		Application of Trustee Governance Mindset	2.3. What? So What? Now What?
		Governance Mindset: The Superintendent's Perspective	2.4. The 5 R's: Read, Record, Retell, Relate, Reflect
		Governance Working Styles	2.5. Governance Working Styles
Governance Mindset Progression			
PART II - GOVERNING FOR EFFICACY	Module 3 Governing With Coherence	Coherence Framework	3.1. The 4 Corner Placemat
		Shared Moral Imperative	3.2. S.T.A.R.
		Distractions and Challenges	3.3. Go to the Wall
		Governance Coherence Progression	
	Module 4 Governance Culture	A Positive Governance Culture	4.1. Developing Governance Principles 4.2. Establishing Governance Norms 4.3. Developing Governance Protocols
		Governance Culture Progression	
	Module 5 The Governance Job	Elements of Governance Responsibilities	5.1. Deep Dive 5.2. Governance Reflection
		Governance Reflection	
		Governance Job Progression	
	PART III - DEVELOPING AND SUSTAINING EFFECTIVE GOVERNANCE	Module 6 Governance Tools	Effective Governance Tools: <ul style="list-style-type: none"> <li>• Discussion Meetings</li> <li>• <i>Governance Handbooks</i></li> <li>• Governance Self-Assessment</li> <li>• Continuing Education</li> </ul>
Module 7 Welcoming New Trustees			Strategies for New Trustees
		Tips for New Trustees	7.2. Turn and Talk
PART IV - CHALLENGES AHEAD	Module 8 Rising to the Occasion	Next Steps	8.1. The 4 A's: Assumptions, Agreements, Arguments, Action



# Module 1

## Moral Imperative and The Governance Core

**“A shared moral imperative—a relentless commitment to the learning of all students, no exceptions—must drive the work of the board and its individual and collective action.”** p. 18

### Learning Processes

- 1.1 Quote Share
- 1.2 Quick Write
- 1.3 Say Something
- 1.4 Think-Pair-Share
- 1.5 The 3–2–1

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# Quote Share Learning Process

## Moral Imperative and The Governance Core

### Objective

- Understand the critical importance of the governance core and the moral imperative.

### Reference

“To be effective, trustees and superintendents must develop a governance mindset, a shared moral imperative, and unity of purpose utilizing sound principles and practices—the keys to effective governance.” p. 26

### Reading

Chapter 1 from *The Governance Core: School Boards, Superintendents, and Schools Working Together* (Campbell & Fullan, 2019)

### Time

20–30 minutes

### Quote Share Learning Process

This process is used to summarize the content of a reading and highlight important concepts. It

encourages deep discussion with colleagues and clarification of ideas.

1. Read the quotes found on the Advance Organizer.
2. Select two quotes that resonate with you.
3. Record your rationale for selecting each of the two quotes.
4. Find a partner and share your selected quotes and rationale for your choices.
5. Discuss what you had in common and what was different.

### Debrief

- As a large group, discuss the key concepts learned through the quotes and share their relevance as a school board.
- Discuss the importance of personal values and beliefs as well as a shared Moral Imperative.

## 1.1 Quote Share Learning Process Advance Organizer

QUOTE	RATIONALE
<p>“Governance is the process where the direction of the organization is set, the structure is established, and accountability both fiscal and programmatic is assured. Governance is the connection between communities and professionals, between policy and application, between strategy and tactics. Generally, governance is about defining the ‘what’ of the organization, and administration is focused on the ‘how’ policy gets implemented.” <a href="#">p. 15</a></p>	
<p>“Governance is not just passing policies; it is what boards and superintendents do together <i>and</i> how they do it.” <a href="#">p. 16</a></p>	
<p>“A shared moral imperative—a relentless commitment to the learning of all students, no exceptions—must drive the work of the board and its individual and collective action.” <a href="#">p. 18</a></p>	
<p>“The starting place for developing unity of purpose is around a central moral imperative from which programs and policies for the district flow. If there is disagreement among the board around this central point, then developing a unity of purpose on the board is almost impossible.” <a href="#">p. 21</a></p>	
<p>“As systems thinkers, trustees must not just think strategically as they lead their local districts but must look up and join with colleagues and superintendents to influence the policies that have such a major impact on their programs.” <a href="#">p. 22</a></p>	
<p>“To be effective, trustees and superintendents must develop a governance mindset, a shared moral imperative, and unity of purpose utilizing sound principles and practices—the keys to effective governance.” <a href="#">p. 26</a></p>	

# Quick Write Learning Process

## Personal Values and Beliefs

### Objectives

- Articulate your personal values and beliefs.
- Think about actions that reflect your personal values.

### Reference

“The moral imperative *is* about all children learning. It consists of strategies to ensure that the learning occurs. It involves rapport between the trustees and the superintendent. It consists of strong focused relationships between the board and staff. It sorts out what is working and not in specific terms. It zeroes in on indicators of progress. It combines excellence and equity.” [p. 19](#)

### Reading

Introduction from *The Governance Core: School Boards, Superintendents, and Schools Working Together* (Campbell & Fullan, 2019) [p. 2-4](#)

### Time

20 minutes

### Quick Write Learning Process

This writing process encourages deep thinking, reflection on practices, and the articulation of your personal values and beliefs.

1. Read the passage above.
2. Using the advance organizer, record your personal values, actions you take to demonstrate it, and ways that it will enhance your contribution to the board. How would you express it as a personal moral imperative?

### Debrief

- Sharing of personal values and beliefs is optional.
- Ask participants to think how their personal moral imperative will contribute to the development of a shared Moral Imperative (Module 3).
- Discuss any important concepts that should be included for future study and/or implementation in the Governance Core Planning Guide.

1.2 Quick Write Advance Organizer

What are my personal values and beliefs expressed as a moral imperative?

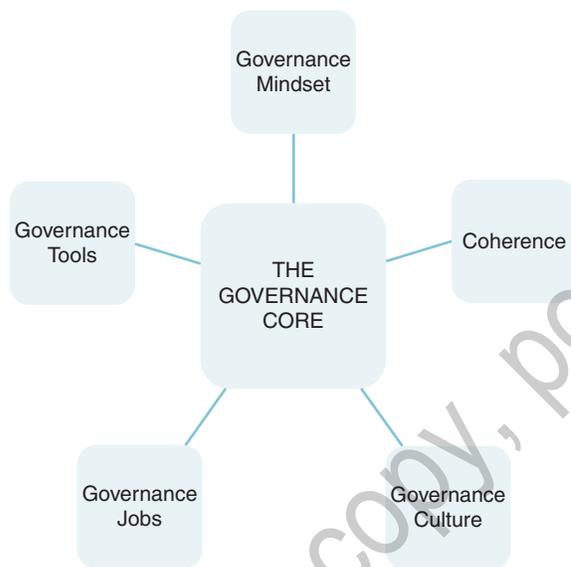
What actions do I take to demonstrate my moral imperative?

How might my moral imperative enhance my contribution to the board's moral imperative?

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# Say Something Learning Process

## Themes of Good Governance



Source: Campbell and Fullan, 2019

### Objective

- Understand the five major themes of Good Governance.

### Reference

“... will the board choose to create a cohesive, unified team working together to create a common vision driven by a shared moral imperative?” [p. 16](#)

### Reading

Chapter 1 from *The Governance Core: School Boards, Superintendents, and Schools Working Together* (Campbell & Fullan, 2019) [p. 17-22](#)

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### Time

30 minutes

### Say Something Learning Process

Say Something is a paired reading activity designed to increase individual and shared understanding of concepts and to foster conversation for deeper understanding (Short, Burke, & Harste, 1995).

1. Find a partner.
2. Decide on a midway break for the reading as outlined above.
3. Read the first section independently.
4. Use the advance organizer to record the key ideas and questions that come to mind.
5. Stop at the midway point and use the Reflecting Prompts to shape the discussion with your partner.
6. Continue reading until the end of the section and repeat the process.

### Debrief

- As a large group, record the key ideas found in the reading selection.
- Discuss any important concepts that should be included for future study and/or implementation in the Governance Core Planning Guide.

# Reflecting Prompts

- Summarize your thinking about the reading.
- Discuss the key ideas found in the section.
- Connect the content to your work on the board.
- Ask questions about a concept or strategy.

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1.3 Say Something Learning Process Advance Organizer

READING	NOTES, HIGHLIGHTS, KEY IDEAS, QUESTIONS
<p><b>Part One</b> Beginning up to a midpoint</p>	
<p><b>Part Two</b> Midpoint to the conclusion</p>	

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# Think-Pair-Share Learning Process

## Guidelines for Board Members

### Objectives

- Examine and discuss the Guidelines in the Governance Core for serving on the board.
- Share application of these Guidelines as a trustee or superintendent.

### Reference

“Effective governance requires that adults, on behalf of the children they serve, find avenues of agreement, so that they can govern the district in an effective manner.” [p. 23](#)

### Reading

Chapter 1, *The Governance Core: School Boards, Superintendents, and Schools Working Together* (Campbell & Fullan, 2019) [p. 23-24](#)

### Time

15 minutes

### Think-Pair-Share Learning Process

This strategy provides an opportunity to read and to process the content individually before sharing with

a partner. The process promotes deeper discussion and serves as a check for understanding through the articulation of content and your opinions.

1. Form pairs or triads.
2. Read pages 23 and 24.
3. With your partner(s) discuss the six Guidelines for serving on the board.
4. Which Guideline is most important to you? Share your rationale for that choice.
5. Share the Guideline that may be the most challenging.

### Debrief

- As a group, decide on the most challenging guidelines.
- Discuss any important concepts that should be included for future study and/or implementation in the Governance Core Planning Guide.

# The 3-2-1 Learning Process

## Governance Highlights

### Objectives

- Organize your thoughts about the concepts presented in Chapter 1.
- Consider concepts that resonate and highlight areas in need of further discussion/study.

### Reference

“Governance is the process where the direction of the organization is set, the structure is established, and accountability both fiscal and programmatic is assured. Governance is the connection between communities and professionals, between policy and application, between strategy and tactics.” [p. 15](#)

### Reading

Chapter 1 from *The Governance Core: School Boards, Superintendents, and Schools Working Together* (Campbell & Fullan, 2019) [p. 13-27](#)

### Time

30 minutes

### The 3–2–1 Learning Process

The 3–2–1 Learning Process provides a tool to identify specific concepts within the chapter that resonate with the participants and spark interest for deeper study.

1. With a partner, read the passage as outlined above.
2. Respond to the questions on the 3–2–1 Advance Organizer.
3. Share your thinking with your partner.

### Debrief

- As a large group, record the ideas generated in part three of the 3–2–1 Learning Process for use in the Governance Core Planning Guide.
- Discuss any important concepts that should be included for future study and/or implementation in the Governance Core Planning Guide.

1.5 The 3-2-1 Learning Process Advance Organizer

3

Three concepts or ideas that are the most important.  
Why did you select these three?

2

Two concepts you would like to know more about.

1

One next step we should take in our development as a governance team.

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# Governance Core Planning Guide

## Module 1 – Moral Imperative and The Governance Core

- Decide on one or two focus areas to implement the Moral Imperative and the Governance Core over the next year.
- Develop one to three actions to implement each focus area.
- Include a lead person as well as a start and completion for the actions.
- Outline indicators of success.

### 1. Focus \_\_\_\_\_

ACTIONS	LED BY	START DATE	COMPLETION DATE
1.1			
1.2			
1.3			
Indicators of Success			
1.			
2.			

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# Governance Core Planning Guide (Continued)

## 2. Focus

ACTIONS	LED BY	START DATE	COMPLETION DATE
2.1			
2.2			
2.3			
Indicators of Success 1.          2.			

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# Personal Reflections

## Module 1 – Moral Imperative and the Governance Core

“Good politics plus good governance wrapped in a systems perspective is the future of public education.”  p. 6

“School board members and superintendents must continually develop a governance mindset individually and together to become a unifying force for fulfilling the moral imperative of raising the bar and closing the gap for all students.”  p. 10

Describe one thing you are most proud of in your school district.



What knowledge and skills could you contribute to developing a positive governance culture on the board?

