



Board Officers Handbook

A guide to the role of the school board president



Iowa Association of
School Boards
Be your best on the board.

Board Officers Handbook

October 2009

This handbook includes original content developed by IASB along with content adapted from materials of the Alabama Association of School Boards, the Oregon School Boards Association, the Connecticut Association of Boards of Education and others.

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Introduction

A school board elects a president to serve as its leader. A board president is a “leader among equals” who has been selected by his or her peers to guide the board in working effectively. Your peers have put their trust in you to provide effective and appropriate leadership while you hold the position of president.

When we looked for a definition of an effective board president, a long list of traits and skills emerged: good leader, navigator, planner, organizer, parliamentarian, communicator, confidant, liaison, conscience, troubleshooter, mediator, initiator, lead learner, and many more.

One thing is clear: The board chair can have a major impact on what the board focuses on and the effectiveness of the board as a whole. This handbook can't teach you all of the leadership, communication and interpersonal skills you'll need to sit in the seat of board president. It can provide an overview of some key aspects of the presidency—and encourage you to think reflect on your work in those areas:

- Proactively building a strong board/superintendent team.
- Planning and presiding at meetings that make the work of the board meaningful and effective.
- Taking a leadership role in dealing with challenges confronting the board.

Goals

This handbook is provided to:

- Provide general guidance for board presidents and vice presidents on the roles and responsibilities of the board chair.
- Provide practical tools and examples that can be used by board presidents in performing their work.
- Serve as a catalyst for encouraging board presidents to shape future supports to be provided by IASB.

Board Officers Workshop

Tuesday, October 27, 2009

6:30-9 p.m.

31 sites statewide via the Iowa Communications Network

This workshop is for board presidents, vice presidents, superintendents, board members aspiring to serve as president, or any interested IASB member.

There is no charge to attend, but pre-registration is requested.
Call IASB at 1-800-795-4272 or register online at www.ia-sb.org

Print and bring this handbook with you as a reference Oct. 27

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Building a Strong Board Team

If you ask many board presidents what their primary role is, they would say it is to build relationships on the board team. The ability to get people with widely diverse opinions to work together on an ongoing basis is a skill that needs development. It takes active listening, and sometimes an ability to put aside some of your own issues, to be successful. It takes the ability to build relationships and help guide those relationships through some rough spots.

The manner in which you treat board members and the extent you help them prepare for and understand their work can help to ensure the board's action both in and out of meetings are complementary.

Several key, interrelated areas need the president's attention to build an effective team:

- Clear, shared goals and a visionary, mission-oriented focus.
- Common understanding of how the board will operate, procedures and norms of behavior and communication.
- Promoting healthy deliberation of the board team.
- Building your relationship with the superintendent.
- Focusing your board on learning and growth.

Clear, Shared Goals and a Mission-Oriented Focus

The best way to build a strong team is to engage it in meaningful work. And there's plenty of evidence to indicate that school boards, engaged in focused work of setting improvement goals for the district, can have a positive impact on student learning and educational quality.

As board president, you have the opportunity and responsibility to bring the board together in setting the direction for your district. You likely have a strategic plan, a school improvement plan, a vision and mission statement, superintendent goals, board goals. Do these important policy statements really drive your work as a board? Are they living documents or just words on paper? Some tips:

- Engage the board in learning about why its focus on core goals is important. IASB can provide background information and materials to help the board understand what's possible when a board and superintendent are able to drive together toward improvement goals.
- Make your core district goals the main focus of every board meeting. As you work with the superintendent to plan the agenda, ensure that items that most directly relate to district goals receive the correct placement and time to garner the board's best attention.
- Schedule reports or actions related to your vision, mission or goals throughout the year, not just as an annual "approve it and move on" item once a year.
- Display your vision, mission or goals prominently in your board meeting room. This visual cue helps to focus the board's attention on what is important and send a message to your community about what you stand for as a board.
- As the board discusses agenda items, ask board members to reflect on how the decision they are making relates to and supports your district's vision, plan or goals.
- Each time you adopt or review a policy, examine it in light of your vision, plan or goals.
- Schedule work sessions to dig deeper into background information to understand school improvement issues related to district improvement goals. The board's deeper understanding of these issues is key to good decision making.



3 Simple Activities to Focus the Board on Vision, Mission and Goals

Reflecting on Our Vision

Use these questions to guide a board discussion about a vision statement.

- Is our vision statement based on truly high expectations for all students? Does it describe the best possible future for our district? How do we know we've described a vision that challenges the district to become the best it can be?

- Did we involve a diverse group of people in coming up with our vision? Does our vision correspond with our community's vision for its schools? Do our staff members believe in this vision and stand solidly behind it?

- Is our vision simply worded and easily understood? Can all board members talk about it clearly?

- Do we use the vision as a guide in making decisions at the board table?

- If we reach our vision, how will life be better for students? For our community?

Mission Matters Every Month

At the start of each meeting, ask one board member to read your district's mission statement aloud to the board and audience, then to briefly identify an item or two on the agenda that they feel exemplifies the board and district staying focused on that mission. This activity can be relatively quick, but help to maintain the board's focus. By asking a different board member to read and reflect each time, you'll be involving the entire board in keeping the board's focus where it needs to be. Caution: Be sure to alert the individual in advance that you'll be calling on them so you don't catch a fellow board member off guard.

Goals: A Reflection on Research

Ask the board to read and reflect on the implications of the research below for their work.

Note: A longer overview of the research is also available from IASB.

From *School District Leadership that Works: The Effect of Superintendent Leadership on Student Achievement*, by Timothy Waters and Robert Marzano. Mid-continent Research for Education and Learning, 2006.

“In districts with higher levels of student achievement, the school board is aligned with and supportive of the non-negotiable goals for achievement and instruction. The board ensures that these goals remain the top priorities in the district and that no other initiatives detract attention or resources from accomplishing these goals. Although other initiatives might be undertaken, none can detract attention or resources from these two primary goals. Publicly adopting broad five-year goals for achievement and instruction and consistently supporting these goals, both publicly and privately, are examples of board-level actions the study found to be positively correlated with student achievement.

The findings suggest that when individual board member interests and expectations distract from board-adopted achievement and instructional goals, they are not contributing to district success, but in fact may be working in opposition to that end.”

Given this research, what are our strengths? How might we improve?

Forming Norms of Communication and Procedure

One of the most important responsibilities of the board president is to lead the board in agreeing on ground rules for how you will operate and communicate as a board of directors. Some groups call agreements of this type their "operating norms." They usually include items such as who will be the board's spokesperson; that once a vote is taken individual board members who disagreed with the decision will not work against that decision; and that each board member will encourage supporters to honor the board's process for making decisions. Gaining agreement on these practices goes a long way in building good working relationships.

The best avenue for discussing these procedures is as close as your own policy manual. Most board policy manuals include an entire series on the board itself (Series 200 in IASB Policy Reference Manual). Engaging the board in a discussion—and affirmation—that these are the shared practices the board agrees to and supports is a foundation of understanding.

These policy statements include:

- Educational Philosophy for the District
- Code of Ethics for the Board
- Powers and Responsibilities of the Board of Directors
- Qualifications of Board Members
- Processes for Resolving Citizen Complaints or Concerns
- Agenda-Setting Process

The key is selecting a set of policies appropriate to the board's work and then engaging the board in a meaningful discussion with questions such as:

- Why is this policy important for our district?
- What standard are we trying to set for ourselves as a board in this policy? How should this policy impact our own behavior?
- How will we respond if we feel that one or more of us is not fulfilling our obligation to this policy as a board member? What process will we use to resolve our own concerns?
- What will be the impact on the board and the district if this policy is not followed?

As a board president, there are some "norms" for you, as well. Your board needs to know you'll act with consistency in areas such as:

- Ensuring all members receive the same information or communication at about the same time and no one feels left out or isolated. Unequal information divides a board.
- Expecting members to use board-adopted procedures for handling complaints or suggestions consistently.
- Contacting and communicating with every member frequently and repeatedly.
- Regularly asking for suggestions and recommendations for improving your leadership and the work of the board.
- Providing opportunities for all members of the board to contribute.
- Supporting the right of each member of the group to speak and to have his or her opinion heard and discussed.
- Being consistent in your treatment of all members; show no partiality.

In short, as a board president, you are setting a model of behavior for others to follow.

Promoting Healthy Deliberation of the Board Team

Healthy Discussions = Good Decisions

Your superintendent has provided a well-researched briefing on the issue before the board, along with his or her recommendation of the proper decision.

Motion.

Second.

Vote: Everybody says aye.

At this rate, your board meeting will be over in record time. Isn't that the sure sign of an effective board president? What's the problem?

The board president has a unique opportunity to ensure the board makes sound and thoughtful decisions by facilitating rich, deliberative discussions among board members as they weigh issues. If your board makes a habit of voting on major issues without thoughtful discussions, you may have short meetings. But the risks are considerable.

- Your board may not fully own its decision. Thoughtful discussions build commitment because they surface values and help people see both the pros and cons of any decision. Most major decisions take support down the road to ensure they can be implemented well. Good discussions along the way help build the commitment it will take to fully support decisions.
- Without a habit of healthy debate and deliberation during the board meeting, it can be all too easy for board members to start making up their mind how they will vote on issues before a meeting begins. That compromises their ability to listen to new data with an open mind and make broadly based, substantive decisions.
- Rushing decisions increases the chances that a decision will come back to haunt the board. If a poorly conceived decision is made, it will become clear that, in its haste, the board was asleep at the wheel. Not only will your board have to correct the situation, but your public credibility will be eroded.
- When board members don't talk to one another, make assumptions, and hurry through issues, misunderstandings are likely, which can lead to a deeply divided board. Thoughtful discussions and open communication help to prevent unresolved conflict and controversy within the board.
- If a decision goes through with little or no debate, some members may resent the fact that their input was not considered. As a result, they may be tempted to undermine the decision.
- Boards that don't weigh issues publicly are often seen as a rubber stamp for the superintendent or school administration.
- Your community likely has diverse viewpoints, even if the board doesn't. Describing how you weighed varying perspectives sends the message that all perspectives are valued.
- Your superintendent needs to understand how each board member sees things—what you value, how you view risks, and what your questions are. That understanding can't occur unless the superintendent knows what you think.

Not every piece of board business demands in-depth discussion—some votes, such as approving the minutes from the last meeting, are routine. On major decisions, however, the board president should actively facilitate an exploration of trade-offs, consequences and perspectives to ensure that everyone sees things the same way and understands the supports that will be needed to make the decision successful.

When a board is divided on a critical issue in the community, it often means the community is divided. As with any form of government, the only way to build consensus is to look at sound data and information, discuss, debate, and, ultimately, make the most informed decision that is in the best interest of all children.

An effective board pools the knowledge of its members, professional staff and advisors. Board meetings resemble a construction zone, where everyone is busy learning and building the truth together. The end product should be decisions that are smart, balanced, visionary, principle-based and sustainable, thereby maximizing opportunities and reducing risk for the school district.

During that “construction process,” the board president should strive to facilitate discussions that allow all board members to explain the rationale and values that guide their decisions—so that other board members—and the superintendent and staff—can hear and consider them. The board president also balances the need for the board to discuss and deliberate as a body with the need to bring other voices to the table—the insights of staff, an outside facilitator, background research from credible experts outside the district, and more.

“Effective participation results in a greater flow of ideas and positions and requires a sound means to deal with the differences that emerge.” –Blake, Mouton and Allen

Top Tips: Wait Time and Self-Review

#1. When asking questions as you work to promote dialogue, it is sometimes necessary to give people a chance to think and the silence may seem fairly long. Learn to be comfortable with silence before moving on to another question or comment if no one responds immediately. Teachers call this skill “wait time” when they are working with students. Ask your question, then pause... don’t rush to fill the silence.

#2. Consider tape-recording yourself at a board meeting. When you play it back, listen for comments or things said that seemed to illicit good discussion. Also pay attention to things you said that brought a lot of silence. Try to figure out what made the difference. It may just have happened that way—or it may have had something to do with what you said or how you said it. Note the tone of your voice. Does it invite participation and open discussion of issues?



Statements that Promote Effective Discussion and Deliberation

1. Connect to the Big Picture

- "How do you see this decision aligning with our district's vision, mission and values statements?"
- "How does the issue align with current board goals or priorities?"
- "Why is our work as a board team to make a good decision important to the students of this district?"
- Why is tackling this issue important to students? To our community? What's at stake if we don't address the issue?

2. Paraphrase

- "I'm not sure I completely understand what you're saying. Do you mean ...?"
- "Before we go on, let me paraphrase what I think you are saying. Are you proposing that...?"
- "Let me restate your last point to see if I understand."
- "I think you're saying... Is that right?"
- "Let me see if I completely understand your position. Are you saying that...?"
- "Are you asking us to...?"

3. Elicit Answers

- "George, what do you think about this suggestion?"
- "Before we continue, I'd like to know what Helen thinks about this."
- "We haven't heard what Jean thinks about this. What is your opinion, Jean?"
- "We've hear from everybody except Mary. How do you feel about what's been discussed, Mary?"
- "Jerry, how would you answer that question?"
- "Of all the information presented on the issue, which pieces most influenced your decision? Why?"

4. Ask for thoughts and feelings

- "How do you feel about ...?"
- "What do you thing about...?"
- "How did you decide that?"
- "How did you feel when...?"
- "When did you come to the conclusion that...?"

5. Dig Deeper

- "What other feelings do you have about...?"
- "How else could we look at...?"

- "What else should be considered?"
- "How else could we go about looking at...?"
- "Joan, what could you add to what's already been said?"

6. Share what you think someone else is feeling

- "Dan, I don't think you agree with what I just said. Is that right?"
- "Lois, I don't think you're satisfied with the logic of that argument. Am I right?"
- "I have the impression that Judy feels isolated by... Is that right, Judy?"

7. Be supportive

- "Jim has a right to feel the way he does. Maybe you could elaborate on why you feel the way you do, Jim."
- "I don't think Ellen means what you think she does. I think she means... Is that right, Ellen?"
- "That's a good question Carl. Thanks for bringing it up."
- "Let's give Walt a chance to tell us what he thinks."
- "Barbara, you've had your turn to say what you think. Let's give Joe a chance to speak."

8. Clarify

- "I wonder if we have enough information to make a good decision. What do you think Mike?"
- "I'm unclear. Can anyone explain in simpler terms?"
- "I don't understand exactly what you mean. What if...?"
- "I'm not clear about... What would happen if...?"
- "Bill is nodding his head. Could you explain it even further, Bill?"
- "Alice is shaking her head. Alice, are you wondering if...?"

9. Get Examples

- "John, will you give us an example of what you mean by...?"
- "When would that most likely occur?"
- "Kathy, can you elaborate on that?"

10. Summarize

- "We've expressed a lot of concerns. Could someone please summarize the primary concerns before we go any further?"

- "There have been a number of good suggestions made. Paul, could you please summarize them so we can see what we have?"
- "I don't think Dick agrees. Dick, could you please summarize your objections?"
- "I've lost track. Could someone please summarize the pros and cons of this strategy?"
- "As we consider our decisions, I'd like to hear each member briefly review both the pros and cons of each choice."

11. Assume nothing

- "Your idea seems to assume that... Is that right?"
- "I have assumed all along that... Is that a correct assumption?"
- "This strategy assumes that... Is it a good idea to assume that?"

12. Check on consensus

- "We all seem to agree on this point. Does anyone think that we should not...?"
- "Henry, do you also think that...?"
- "Before we go on, let me make sure that we're all thinking about the same thing."
- "I think there is quite a bit of common ground here. Maybe we can take a moment and identify the things we agree on."

13. Call for action, clarify action

- "I'm sensing we are ready to vote on the issue. Does anyone else have a final comment?"
- "We've been discussing this issue for some time now so let's restate the motion. The motion before us is _____. All in favor say aye. All opposed say nay."

14. Make a suggestion

- "In order to..., why don't we...?"
- "Would it help if we...?" (Example: "Would it help if we reviewed the data with staff?")

15. Adopt a practice

- "I think I may have monopolized the conversation. I suggest we go around the table to see what everyone else thinks about this."
- "Maybe it would be better if we rated each idea and narrowed down the choices in that way."

16. Pause or defer

- "I think we've been going around in circles. Let's stop and take a break."

- "I think we're saying the same things over and over. Let's stop discussing it for a minute and take turns telling the group how we feel right now."
- "I'm noting we have a number of questions about this issue. Maybe we need more information. What issues would you like to have addressed to make a final decision work for you? Then we can bring this item back for further discussion on a future agenda."
"I'd like us to take more time so the staff can present us with more alternatives and we can explore them before we vote on this issue."

17. Stay on track

- "What are our goals?"
- "Are these the right questions?"
- "Are there other ways to do this?"
- "How is this related to the topic?"
- "I hear two ideas being presented here. Maybe if we took them one at a time we could better discuss them."
- "This has been a rich discussion on many angles and that's good. We've committed as a board to data-driven decisions. I would like someone to summarize only the data-driven aspects on this issue."

18. Acknowledge dissent

- "Darryl, by the expression on your face, I don't think you agree with this. Is that right?"
- "Claudia, you haven't said much. Does that mean you have some reservations about the proposed solution?"
- "Warren, you seem hesitant about this. Do you disagree with the strategy?"
- "I think maybe you two aren't really saying different things. Can someone else summarize what he or she is hearing Joe and Polly saying?"

19. Walk in someone else's shoes

- "How would you feel if you received that answer?"
- "Let's consider where Carol is coming from."
- "Let's think about why this request was made."
- "If you were a staff member affected by this decision, what would you want us to consider?"
- "What are the barriers or problems parents might face if we change this policy?"

20. Create scenarios

- "If this doesn't work, what will happen?"
- "Let's think of everything that could go wrong if we did this."
- "If this does work, what other effects might it have?"



Consider the Differences....

The Less Helpful column includes comments which could cut off participation or cause people to hesitate before saying something. Statements such as those tend to drive discussion toward “taking sides—yes vs. no” or to become defensive. They are often stated in a way that shows a bias on the part of the board chair.

The More Helpful column provides alternative ways of communicating that can encourage open and balanced discussion.

Less Helpful	More Helpful
Everybody in favor of this motion? Anybody opposed?	Would all those in favor please say “aye” Would all those opposed please say “no.”
You’re not making any sense. We don’t understand what you’re saying.	Could you clarify that for us? Say a little more about that.
We spent all last year resolving that.	What do you think is still unclear about that?
I don’t see what that has to do with that question.	Talk to us about the connection between what you’ve just said and our main question now.
Should we increase the support staff?	What are some things we could do to solve this issue?
Shall we cut the budget?	What are some steps we could take to solve this money crunch?
What do you think of my list of criteria for the new superintendent?	What would be helpful qualifications to look for in our new superintendent?
You’ve left something out.	Jim has framed an important concept. Who has something to build on Jim’s idea?

The Board President and the Superintendent

By the nature of the position, the board president will have a very different relationship with the superintendent than others on the board. Usually the board president and superintendent collaborate on the meeting agenda and other operational issues facing the board. The superintendent will depend on the board president for guidance, and the board president should look to the superintendent for the same.

Although the superintendent is not a member of the board and does not vote, wise boards realize the superintendent is an important part of an effective governance team and accord the superintendent's views with proper respect. A board functions better in a collaborative relationship with the superintendent. The board president must pay meticulous attention to keeping the board-superintendent partnership healthy.

It falls to the board president to represent the whole board's voice to the superintendent. By your election as board president, you take on the job of both building the common voice of the board and reflecting it with clarity to the superintendent.

While the superintendent must communicate with all members of the board, it's safe to say that the superintendent and board president generally communicate more frequently and in greater detail. Plan on conversations that allow a lot of concerns and smaller issues to be efficiently discussed and the connection between the superintendent and the board to be maintained. Many of the issues don't—and shouldn't—rise to the level needing whole-board discussion at the board table. Other board members will depend on you to keep that open line communication with the superintendent flowing. Your ability to say to other members of the board that issues are being addressed can save time and energy for both the rest of the board and for the superintendent.

There are no hard and fast rules for how much additional communication is appropriate. You and the superintendent have to find what works for you. As board president, you'll need to strike a balance that allows trust on both sides: the trust of your board that you as president are representing the entire board in providing oversight to the superintendent's work, and the trust of the superintendent that this more intense scrutiny doesn't rise to the level of micromanagement.

A few other tips:

- Help the superintendent identify what information and detail the board needs in order to make good decisions and to ensure that board members are getting sufficient information on issues in advance of board meetings or actions. Ask for relevant facts and additional data when needed on behalf of the board.
- Help your superintendent keep the board well informed enough on small issues that members hear no surprises from others: they hear it first from the superintendent or you.
- Urge board members to relay to the superintendent all concerns, problems, issues and information relating to board or school issues.
- Ask board members to use board policy for handling complaints so that citizen or staff concerns are relayed to the superintendent or to the person immediately responsible for solving the problems.
- Deal with problems by starting with the superintendent. Your superintendent and you set the tone and direction for the school system. The better your communication, the better your combined leadership.

If you, as board president, are having difficulties working with your superintendent, you owe it to yourself and to the rest of the board to meet with him or her and try to work out your differences. The superintendent needs to be able to discuss matters with you as well, without fear of repercussions. A level of trust must be established in order for this relationship to work.

A good board president will work hard to resolve the differences between board members and the superintendent. If things get out of hand, don't hesitate to call in an outside facilitator, such as an IASB staff member, to help mediate the issue.

Superintendent Evaluation

Iowa school boards must evaluate the superintendent annually using procedures described by law. As board president, you'll coordinate this process on behalf of the board. A few general guidelines for board presidents:

- You'll need a sound understanding of the evaluation process and the steps necessary to complete it. IASB offers many resources, planning tools and background information on this process. Visit the Human Resources section of the IASB Web site at www.ia-sb.org, or call IASB to obtain copies.
- Annually in the fall, it's a good idea to engage the board in reviewing the timelines and procedures the board has approved so everyone knows agrees on how superintendent evaluation will occur.
- You may facilitate the process or ask for help. IASB offers a superintendent evaluation service that provides facilitators to help the board and superintendent set goals and indicators and evaluate progress throughout the year.
- At the end of each year, the board president has the responsibility to make sure that a written document is put into the superintendent's personnel file.
- During the formal evaluation discussion, keep the board's focus on the agreed-to goals and indicators.

Top Tip: Clear Closure for Board/Superintendent Discussions

Focusing on a “clear closure” is a great technique for the board president to bring clarity and understanding between the board and superintendent. A clear closure seeks to leave no doubt about commitments. Use your leadership role to ensure that everyone is on the same page and fully understands and supports the agreement. The concept of clear closure can be used for any important discussion. Our example below focuses on one of the board’s most important discussions with the superintendent—setting annual goals and indicators for superintendent performance.

You might bring closure to a goal-setting discussion with the superintendent by turning to both the superintendent and board to confirm their understanding and commitment.

To the superintendent: “At this time, I want to confirm with our superintendent: Are you comfortable that the goals and indicators as we’ve laid them out are clear and give you enough guidance about the board’s priorities and the evidence we’ll need to review in order to evaluate your progress?”

To the board: “Before we leave this discussion, I also want to clarify that each board member fully supports that these are the priorities for the superintendent’s attention this year? And, can you affirm that receiving data and reports throughout the year on these indicators will be the basis of our evaluation?”



Building our Relationship: Discussion Questions for Board Presidents and Superintendents

If you are new to the role of board president—or beginning a relationship with a new superintendent—these discussion questions are a sound starting point for building a common understanding of your roles and responsibilities.

- What are the roles and responsibilities of the board president? What is the role of the superintendent in working with the board? How are our roles parallel? How are they different?
- What are the responsibilities of the board president and superintendent in the communicating with each other and with the board as a whole? How much and what should be communicated to the entire board? How will we know everyone on the team has the same information?
- What process will we use to work together to plan the meeting agenda? What kind of supports will the board president need in order to prepare for leading each meeting?
- What major issues will come before the board this year? When? What kind of lead time will be needed to ensure that the board has enough information and time for good decision making? How can we organize the workload of the board to ensure that important items receive appropriate attention? Do we need a governance calendar that maps out major issues and when they'll be before the board? What issues before the board this year would benefit discussion and deeper study at work sessions?
- How do we ensure that new board members are oriented to board work and have the supports they need? What are our respective roles in the orientation process? How do we encourage quality individuals to run for the board in the future?
- How does the board/superintendent team deal with a “challenging” board member? Whose responsibility is it?
- What is the process and timelines for superintendent evaluation? What about board self-evaluation? How do the two processes blend together?
- Are we, as a board president and superintendent, truly encouraging and leading the board in pursuing a policy and governance role vs. an administrative or management role? How are we ensuring the board is focused on vision, goals, policy and accountability?
- What learning and development needs will board members have in the coming year? How will we ensure that board members receive training or inservice that will help them fulfill their roles?

Helping Your Board Learn and Grow

Promoting Professional Development: Most board members are serving in their first elected position, and have little or no experience in public office. Even if they have such experiences, there are a host of issues that school boards face every day that need to be prepared for. The board president should encourage board members to take advantage of training opportunities wherever possible. IASB has a number of workshops each year, including a comprehensive Orientation to Governance workshop, as well as the annual IASB Convention, and many more.

As board president, you can engage the board in identifying the kinds of learning opportunities that best fit your board's current needs. Whether the board engages in IASB events and training, or staff provide learning activities, or you bring in outside presenters—learning improves the knowledge you'll need to make good decisions and helps to build a strong board team. As board president, modeling that learning sets the stage for others to follow suit.

Engaging the Board in Self-Evaluation: A board self-evaluation allows school board members to step back from everyday business and candidly reflect on how well they are meeting their responsibilities. Self-evaluation helps the board bring forth ideas and issues that, left undiscussed, might become major sources of frustration.

The four self-evaluation tools included in this handbook have different formats—some boards prefer one format over another. The format isn't as important as the goal: helping your board reflect on its strengths and weaknesses, gain a better understanding of agreement areas, and identify goals to improve your work at the board table.

As a board president, you can build in self-evaluation activities to the ongoing work of the board. IASB also provides supports for boards that wish to take a deeper look at their work, including their focus and leadership for student achievement. Call IASB to schedule a facilitated self-assessment work session for your board.

Developing Future Leaders: You may serve as board president for a year—or for 20 (yes, it's happened!). No matter what your term, everyone benefits if you have your eye on “who will seat in this seat some day.” Certainly the role of vice president is a way to nurture future board leadership. It's also good to encourage all board members to take on leadership roles and to build their skills in board leadership. You might:

- Designate a board member to lead a discussion during a board work session in order to give board members experience facilitating.
- Ensure that various board members are serving as chairs for any board committees.
- Identify a board member to take “the point role” on legislative issues, keeping the board engaged in advocacy. These days, every board member must be a legislative advocate—but having someone on the board who organizes that advocacy can be helpful to everyone.



How are we doing?

Evaluating our Board Meeting Process

Ratings: 1 - always 2 - sometimes 3 - never

	1	2	3	Comments
<i>Before the meeting ...</i>				
Are board agendas developed from information provided by both board members and administrative staff?				
Are agendas made available to board members, staff, and public at least a few days prior to the board meeting?				
Are agendas sent to board members accompanied by sufficient background information?				
Do board members study agenda, supporting materials, minutes, financial reports, etc. before the board meetings?				
Has the board adopted or does it follow written procedures for the orderly conduct of meetings?				
<i>At the meeting ...</i>				
Are visitors provided copies of the agenda and information about meeting procedures?				
Is the administrator invited to speak on agenda items and, if appropriate, make recommendations before action is taken by the board?				
Is the public invited to speak on agenda items and, if appropriate, make recommendations before action is taken by the board?				
Do we follow parliamentary procedures as appropriate to our practice and policy?				
Do we clearly identify for administration items that need follow-up or further information?				
<i>After the meeting...</i>				
Do we communicate board action to key audiences, including staff and the media?				



IASB

Board Meeting Review

What decisions were made in this meeting which will have the most impact on children and learning? (List two decisions and state why you feel they were particularly important.)

Did the board spend a significant amount of time on these decisions? (What proportion of time was spent in this area?)

Will the public know the reasons for the decision making from the board's discussion of these decisions?

What information was most helpful in making decisions? (List two or three specific pieces of information which you found helpful.)

What additional information would have been helpful? (If you can think of additional helpful information, where might this information be found?)

Please circle the answer which best described your feelings. Please briefly explain any "no" answers.

Yes No I had the opportunity to participate fully in this meeting.

Yes No The order of the agenda contributed to efficiency and effectiveness of deliberations.

Yes No The purpose of the meeting was clear, actions taken related to district goals.

Yes No The board president kept the focus of the meeting on the board's purpose.

Yes No We used time well in this meeting.



Our School Board Meeting: A Quick Assessment

Use this quick instrument at the end of each meeting. Hand in to the board secretary to compile. This quick assessment provides instant feedback to help the board president, board members and administration make good decisions about future meetings.

	Very Little				Very Well
1. I clearly understood the decisions we made in this meeting. I understand their relation to the district's vision and mission. <u>Please explain your ranking.</u>	1	2	3	4	5
2. I listened to others' opinions, and understood their position, even though they didn't always agree with me. <u>Please explain your ranking.</u>	1	2	3	4	5
3. I felt all board members had an opportunity to participate equally in the deliberative process. <u>Please explain your ranking.</u>	1	2	3	4	5



	Less than 10%		50%		100%
4. I felt the board spent the following percentage of its time on student achievement and student learning related issues. <u>Please explain your ranking.</u>	1	2	3	4	5
5. What was the most useful information the board received prior to the meeting that assisted the board in making good decisions?					
6. What kind of information might help the board make better decisions in the future?					



Board Meeting Evaluation Questions

Review the questions below as a starting point, then identify one area of strength the board showed at tonight's meeting and one area that could be improved from tonight's meeting. The board secretary will compile responses to be shared with all board members and used by the board president and superintendent in planning future meetings.

1. Did we spend our time on what matters most?
2. Did all board members have an opportunity to be heard?
3. Did we have adequate information on all topics?
4. Did we consider the expertise of staff and the data and needs of our district?
5. Did each of us make clear the rationale behind our decisions?
6. Did we treat each other with respect?
7. Did we follow appropriate rules of meeting procedure and decorum?
8. Did we welcome community or staff observers as valued guests?
9. Did we offer recognition to celebrate the accomplishments of students, staff or volunteers?
10. Did we commit time to our own learning to support informed decision making?

One **Strength** We Showed Tonight as a Team:

One Area I'd Like Us to **Work on** as a Team:

Planning and Presiding at Meetings

Conducting a board meeting is more than “banging the gavel.” A successful board president must blend the authority and responsibilities of planning and chairing the meeting with leadership and interpersonal skills to help the board reach effective decisions.

Planning the Agenda

The agenda is the “road map” for effectively conducting a meeting. Working in partnership with the superintendent, the board president plans the agenda for each board meeting. The superintendent may prepare a draft agenda to review with the board president, or the two may meet first to discuss the agenda. The superintendent needs to prepare the board president by providing complete background information before the meeting. However this process occurs, it's important that the board president:

- Know the reason each item is on the agenda.
- Be able to predict problems that might arise from an agenda item.
- Estimate how much time each agenda item might take.
- Know what, if any, board action is required for each item.
- Know what reports the superintendent and staff members will make.
- Know what recommendations the superintendent will make.
- Prioritize order and placement of items on the agenda so that important items are ensured attention.
- Identify routine items to be placed on a consent agenda.
- Clarify how the public will participate in the meeting.
- Identify celebrations and recognition of staff, students or community to occur at the meeting.

"Housekeeping" Duties

As a leader of the board, the board president also takes responsibility for ensuring, or delegating to the board secretary or superintendent, to:

- Ensure that board members receive information packets several days before the meeting.
- Ensure that board members, the public and the news media know the dates, times and locations of meetings.
- Check the meeting room to make sure it suits the board's needs (temperature, lighting, noise level, etc.).
- Arrange seating so that all board members can see and hear one another. (IASB recommends a U-shaped set-up so that all board members can see one another and the audience can see the board.)
- Make the board room as comfortable for visitors as possible. Have enough chairs, good ventilation and attractive surroundings. Ensure that an amplification system is in place, if needed, so members of the audience can hear the board's discussions.

- Ensure that members of the public or observers are greeted and have information about board meeting procedures and processes, including who the board members are, how people can address the board, and why the board goes into closed sessions. Provide all visitors with clear information about how and when they can comment on agenda items.
- Support the needs of the media covering board meetings.

Presiding at Meetings

The board president introduces each agenda item, facilitates board discussion and leads the board to a decision on action items. The president's authority and responsibilities include:

- Call the meeting to order on time.
- Setting a positive tone for the meeting.
- Repeating all motions in their entirety before taking a vote.
- Preserving order.
- Moving the meeting along by adhering to the agenda.
- Keeping discussion centered on the issue.
- Promoting discussion, allowing all sides of an issue the opportunity to be heard.
- Treating all board members fairly and equally.
- Understanding and using basic parliamentary procedures to ensure that motions and votes occur appropriately.
- Bringing each issue on the agenda to conclusion in a clear way.
- Ensuring that all meetings comply with the Iowa Open Meetings Law.
- Adjourning the meeting.

The President as a Member of the Board

Being board president does not take away your rights as a board member. You may curb your participation to allow others to speak first, but you can have an opinion. As an elected official you are expected to take part in board actions; as the board's leader, you must be cautious not to dominate the discussion or force an opinion on the board.

The president may **make motions** and does not have to leave the chair to participate in discussions. IASB recommends that the board president use this authority to make motions sparingly. We do recommend that the board president turn over the chair to the vice president when making a motion so the board president doesn't get in the position of ruling on his or her own motions.

The board president, like all board members, is expected to **vote on each motion**, provided there is no conflict of interest.

Parliamentary Procedure

Most boards used a form of Robert's Rules as a way of keeping order and ensuring meetings run efficiently and with focus. As president, you should become familiar with these rules and with parliamentary authority. The key is to use common sense in their application. Parliamentary procedure is a tool that can aid—or limit—discussion. Ensure that all members of the board are

comfortable with the structure they provide, and take extra care that a member's participation isn't inhibited by feeling they can't navigate the proper way to make a motion.

IASB provides a laminated card as a quick-reference guide to **parliamentary procedure**. It's available at no charge to members upon request.

For a more detailed guide to parliamentary procedure, you might purchase a copy of *Robert's Rules of Order Newly Revised In Brief* by Robert, Evans, Honemann and Balch, De Capo Press, 2004.

Top Tip: The Consent Agenda

What should be included in a consent agenda? How and why should a consent agenda be used?

A consent agenda generally groups several routine, uncontroversial items together to be voted on under one motion, rather than calling for multiple separate votes. The purpose of consent agendas is to help boards manage time and keep the meeting flowing smoothly so that they can focus on the most important matters. Appropriately used, the consent agenda frees board meetings from administrative details and repetitious discussions. Items commonly on a consent agenda include bills, personnel and employment recommendations, enrollment update, small contracts, open enrollment requests, minutes of previous meetings, committee reports, school calendars, or routine correspondence.

Items are removed from the consent agenda and discussed separately upon a board member's request.

Take the Lead: Ensure Your Meetings Comply with the Law

You've been aware of the Open Meetings Law as a board member. As board president, now is the time to be attentive to the details. The ball is your court—the superintendent and board secretary need to know about the laws and in practice they will be a tremendous help to you in conducting board business in alignment with the law. But it's YOUR responsibility as board president to understand the law and take the lead in ensuring your board complies with them.

The board president must understand and enforce the rules for public meetings outlined in the law. IASB provides several in-depth resources to help all board members understand the law so we'll include only an "at a glance" view below. Among your options for deeper learning: download resources from the Legal/Policy section of the IASB Web site; see the *IASB School Board Member Handbook*; or attend the IASB Convention where open meetings and public records laws are regularly covered in depth.

Iowa Open Meetings Law at a Glance

Iowa Code, Chapter 21.5

Which boards are subject to the open meetings law?

- School boards
- Area education agency boards
- Community college boards of trustees
- State Board of Education.

Which board advisory committees are covered?

- Advisory committees created by statute.
- Advisory committees appointed to advise the board on policy issues.

What is a meeting?

A gathering in person or by electronic means:

- formally or informally
- of a majority of members of a board, including certain advisory committees
- where deliberation or action upon any matter within the scope of the board's policy-making duties takes place.

What is not a meeting?

A gathering of members of a board:

- formally or informally
- of a majority of members of a board, including certain advisory committees
- for purely ministerial or social purposes, and
- where there is no discussion of policy or intent to avoid the purposes of the open meetings law.

What are other requirements of the law?

- Give appropriate meeting notices: posting a tentative agenda 24 hours in advance.
- Hold meetings in a location accessible to the public.
- Conduct the board's business at public meetings.
- Provide written minutes for board meetings; make them available to the public.
- Use closed sessions only for specific reasons authorized by law.

What are the rules for using a closed session?

- May be used only for reasons expressly allowed by law:
 - ✓ To review or discuss records which are required or authorized by state or federal law to be kept confidential, or to be kept confidential as a condition for continuation of federal funds;
 - ✓ To conduct hearings to suspend or expel a student, or to discuss whether to conduct such a hearing, unless an open session is requested by the student or a parent or guardian of the student if the student is a minor;

- ✓ To evaluate the professional competency of an individual whose appointment, hiring, performance or discharge is being considered when necessary to prevent needless and irreparable injury to that individual's reputation and that individual requests a closed session;
 - ✓ To discuss strategy with counsel in matters that are presently in litigation or where litigation is imminent where its disclosure would be likely to prejudice or disadvantage the position of the governmental body in that litigation;
 - ✓ To discuss the purchase of particular real estate only where premature disclosure could be reasonably expected to increase the price the governmental body would have to pay for that property.
- Motion to go into closed session must state a reason listed in the law. Motion must be approved two-thirds of the members of the board, or all the members present at the meeting. The vote of each member and the reason for the closed session, as listed in the law, must be announced publicly at the open session, and entered in the minutes (21.5).
 - Only the business stated in the motion may be discussed in the closed session.
 - Any final action must be taken in open session, unless some other provision of the Code specifically permits action in closed session (21.5).
 - Detailed minutes must be kept of the closed session, including "discussion, persons present and action occurring." A tape recording also must be made. These are sealed records opened only on court order. Minutes and recording of a session involving real estate purchase are open to the public when the transaction is complete (21.5).

What kinds of meetings are exempt from the law?

- Termination hearings of licensed employees
- Board hearings on termination of an administrator's contract
- Collective bargaining or strategy sessions
- Strategy sessions regarding non-union employees.

A Meeting in the Public vs. a Public Meeting

The Open Meetings Law requires that the school board meet and perform its duties in public. This "meeting in public" is an opportunity for the board to discuss and make decisions around its stated agenda. Citizens have the right to observe the meeting and hear all comments made by board members as business is conducted. School board meetings are not, however, a meeting of the public--an opportunity for the public to discuss issues. There is no provision in the law that requires the board to listen to the public at their meetings, although under most circumstances IASB recommends the board allow some opportunities for the public to express their views. Most boards have some time during the board meeting when they allow the public to comment. It may be a separate agenda item or the board may allow citizens to speak on specific agenda items, or both.

It's important for the board president to remain firmly in charge of the meeting. It's entirely appropriate to limit public comment to a few minutes at the beginning or end of a board meeting and to place a time limit (usually 2-3 minutes) per speaker. The board president must be careful to ensure that any rules, such as time limits, are applied uniformly to all members of the public.

Boards should not act upon a citizen's concerns at the board meeting unless the issue is already part of the stated agenda. The common practice is to refer the item to the administration for review and refer the citizen to the chain of command policy as a resource for resolving their concern in an appropriate way. If the citizen has already followed the chain of command and is appealing to the board, unless the specific item was on the agenda, the board should not act at this board meeting but wait until the next one.

Hearing from Your Citizens: Open Forum Tips

Establish a board policy for consistency.

Provide information to help citizens understand the ground rules.

Listen without making commitments at that time.

As a board, direct administration to follow up as needed.

Top Tip: Framing Open Forum

President's Comments to Audience: At the Start of Open Forum

"Our next agenda item is Open Forum. On behalf of fellow Board members, at this time I would like to invite any member of the audience to step to the microphone with comments about district issues. Please begin by stating your name and address. It would be appreciated if you would limit your comments to _____ minutes so that we can keep the meeting moving in a timely fashion and allow others an opportunity to speak. We ask that you remember that Iowa law prohibits us from commenting or acting on the issues brought up tonight unless they are part of the agenda. We also want to remind you that if you make comments about specific individuals, it may expose you to legal action by that individual. Thanks for your support of our school district."

To Close the Open Forum

"That concludes the Open Forum portion of our agenda. On behalf of the board, I'd like to thank our citizens for sharing your ideas and concerns with the board. I'll remind you that board members are available outside the board meetings to listen to their constituents. At this time we'll move to the board's discussion of other agenda items."

Special Issues and Challenges of the Board Presidency

You Sign on the Bottom Line:

The Board President and Signing Warrants

The *Iowa Code* (below) states the board president must sign all contracts and warrants (checks.) Many board members and school district employees do not realize that only the board president can sign contracts. There are two exceptions to this law which are individual contracts for teachers and support staff. Through board policy, the board may delegate the authority to sign contracts for teachers and support staff to the superintendent. There is no exception for a superintendent to sign administrator contracts. There are also no exceptions for the board to delegate the authority to sign any other type of contract into which the school district may enter (such as leases or 28E agreements). Contracts signed by parties other than the board president are often found to be void since they weren't entered into in a legal manner.

Although the law requires the board president to sign all checks, as a practical matter, most board presidents have a signature stamp for checks that is used by someone other than the board secretary to ensure two unrelated signatures on every check. But, in order for a board president to use a signature stamp, that authority must be in board policy. So, before you use a signature stamp ensure the appropriate authority is in place. Should you not have the language, contact IASB and we can get it to you.

Iowa Code § 291.1 PRESIDENT -- DUTIES.

The president of the board of directors shall preside at all of its meetings, sign all contracts made by the board, and appear in behalf of the corporation in all actions brought by or against it, unless individually a party, in which case this duty shall be performed by the secretary. The president or the president's designee shall sign, using an original or facsimile signature, all school district warrants drawn as provided by law. The board of directors, by resolution, may designate an individual, who shall not be the secretary, to sign warrants on behalf of the president.

Dealing with Conflict

Conflict occurs naturally within any group—you have different values, different interests and points of view. Unresolved conflict can tear your board apart. Your board will experience various types of conflict:

- Disagreement over what problems are most important
- Differences about how to accomplish the board's goals
- Feelings of rejection directed at you as the leader
- Feelings of isolation by one or more members
- Desires of members to push their personal wishes;
- And more.

As board president, you must help the board see and deal with conflicts as they arise. When the board successfully tackles a tough situation, it will emerge healthier and stronger than before.

Conflict resolution skills can be learned. The basic steps are outlined here.

- Recognize that conflict exists: Admit there might be a problem; don't ignore it, it's not going away.
- Acknowledge to the board that there is a conflict; before your board can begin to resolve conflict, it must acknowledge that a problem exists.
- Diagnose the problem: Find out as much as possible about what is happening, who is involved, who feels strongest, and where the source of the disagreement lies.
- Identify what each person needs and wants: each person who is involved must have a clear idea of what the others involved want.
- Identify areas of agreement: More attention to areas of agreement lessens energy wasted on disagreements.
- The key to making conflict work for you is to remember that conflict, like other problems, is solvable. When you act as if this is true, it tends to happen. Convey your view that conflict is a natural occurrence—a roadblock, not an insurmountable obstacle.
- The important thing is not whether you have conflict—because you will—but how you deal with it as a board.

In particular, the board president should be very sensitive to those board members who find themselves in the minority regarding their positions on issues facing the board. When a true consensus is reached, even those in opposition may help frame a decision that is better than the original. Getting every member of the board to contribute is a challenge, but worth the effort.

When a board is divided on an issue, it's important that the minority viewpoint is heard and considered, before the board makes a decision. Most deep conflicts on boards result from one side of an issue experiencing frustration because they feel they don't have a voice. Allowing the losing side of an issue to save face will go a long way toward healing any breach that may exist or be developing between members of the board.

“We have this one board member...” There are very few “bad” board members. There are sometimes board members who behave inappropriately. Often their inappropriate behavior is borne out of frustration or inexperience. The board president can have a lot to say about whether or not this person becomes a valuable addition to the board. Every board member has something to add to the board's collective wisdom, but sometimes a personality will get in the way. It's up to the board president to try to bring that person aboard and help the board member be a productive part of the team.

If a board member's behavior is troubling to other members of the board, the board president will likely feel pressure from the rest of the board to “deal with it.” It's a balancing act to find ways to connect with a struggling board member in a productive and respectful way, while also managing the pressure from the rest of the board.

A first step in the process may be to call the board member and share your concerns. Just as important is for you to listen to their frustrations and try to help them along. You might ask them to lunch. During board meetings, if you know they have strong feelings about an issue, ask them if they want to add their comments to the discussion. You won't always succeed, but it's worth the try.

Sometimes the use of an outside consultant to discuss roles and responsibilities of board members will help. It's important to try to keep personalities out of it, and that no one on the board is a target of hostility.

On rare occasions, nothing you try will work. At that time, it's important that the rest of the board work with you to see that the errant board member doesn't disrupt the meetings to the point where business reaches a standstill.

Difficult Personnel Issues

The board president will sometimes need to lead the board in dealing with difficult issues regarding district employees. Remind the board that some basic rules need to be followed:

- The only employee the board hires and terminates is the superintendent. The board approves contracts for all other employees on the recommendation of the superintendent.
- Personnel matters are the responsibility of the superintendent. The board president must ensure that the board knows that any investigations or personnel issues must be conducted and resolved by administrators or outside counsel – not the board or individual members.
- When and if an employment issue comes before the board, the board must be able to make an impartial judgment on the case. The board has a legal obligation to be the judge and jury. If the board is prejudiced against the employee and has prior knowledge and has made a judgment, then the employee isn't getting a fair process. You want to make sure that your employees have a fair hearing before the board.
- Discussions and decisions must be based on facts – not rumors or personal opinions. Allow the process to work and administrators to investigate and deal with issues with the employee.
- The board is not only the employer – it is the PROTECTOR of employee rights. Pressures from citizens to address employee issues must be balanced with the board's responsibility to ensure a fair and just process.
- Depend on your attorney for step-by-step legal guidance in personnel matters that come before the board. This is not an area to wing it.

When employee issues are brought up by citizens or individual board members at board meetings, the board president should:

- Caution everyone (board members, administrators and the public) that matters affecting personnel may only be discussed by the board when they come before the board under appropriate procedures defined by law. The board does not have the authority to address specific personnel matters except as defined by law.
- Say that personnel matters will be referred to the administration and, if appropriate, a report will be made to the board.

When the public is demanding or defensive, more tact is required, but also, a firmer hand in leadership. When it comes to personnel issues, the amount of public information is limited.

The "public" does not have "a right to know" the intricacies of personnel issues. They usually have a deep, burning desire to know. The public has a right know that they are being listened to and that the board and administration treat all concerns seriously and act appropriately. Citizens may not understand the need for the board to maintain confidentiality – that doesn't change the need to do so.

If citizens come to your board meeting to complain about a specific employee, you might adapt this statement.

“Thank you for coming tonight. This board cares deeply about providing a quality staff throughout this school district. We’re committed to fair and equitable treatment of employees and to following all board policy and legal requirements regarding personnel issues. This board has a standing expectation and commitment that our superintendent will provide effective management and deal with all personnel issues in compliance with the law and in accordance with board policy. If citizens here tonight have concerns about specific personnel, we direct them to talk further with the superintendent or appropriate building administrators. The board meeting is not the appropriate forum to discuss specific employees because of our legal obligations regarding personnel.”

For more guidance on personnel issues, visit the Human Resources section of the IASB Web site, www.ia-sb.org.

Community Controversy

The worst nightmare for most board presidents is a community confrontation at a board meeting. In this age of emerging pressure groups, distrust of elected officials and school reform that demands rapid change, the potential for confrontation at board meetings is great. However, with good planning and a solid year-round communications program, most confrontations can be avoided.

If a subject is even remotely likely to become controversial:

- Gather data in advance so you are ready with the facts.
- Involve the right people early in the development of a proposed solution.
- Provide a lot of information in advance. If people have good information, they are less likely to become angry. Once they are angry, they usually do not trust the source of the information, so they discount what is said to them.
- Have procedures in place for handling the re-instatement of expelled students, complaints about curriculum, attempted censorship of library books and other potentially volatile educational issues.
- Make sure your district's policies are up-to-date and clearly state your stance on critical issues that may become controversial.

If you just can't avoid these controversial issues ...

- Let people know exactly what you will be doing to resolve a controversial issue. Clarify from the beginning how a decision will be made, the role of those who are giving advice, who will make the final decision and the timeline for making the decision.
- Identify "key communicators" around a critical issue and meet with them as early as possible. "Key communicators" are influential people who are trusted, respected and listened to. They may vary from issue to issue and from community to community. For example, if the issue is student prayer in schools, the key communicators may be ministers, leaders of various ethnic groups, attorneys who are concerned with separation of church and state and others. Make a list of who they are and meet with them to provide facts and

listen to their concerns. Getting their understanding and support builds a powerful, respected information source in the community and can prevent an issue from causing unnecessary confrontation.

- Find lots of ways to listen to those who are upset about a controversial issue. Be sure to do this long before the issue will be considered at a school board meeting.
- Hold public meetings to hear from people who are interested in this subject. Give them information and listen to them. Clarify for them how the decision will be made and what further actions they should take to ensure that their views are heard.
- Consider conducting a survey to get a true picture of the opinions of those who will be affected by the decision. For example, if the issue is whether to adopt school uniforms or change the starting time of school, you may want to survey parents before making the decision. Surveys often show that those who have been most vocal on a subject do not necessarily represent the majority view.
- Establish "fair" rules for hearing from the public. Establish the same rules for everyone who wants time on the board agenda, and clarify those rules. If the board does not allow complaints about personnel in an open board meeting, make that clear.
- Don't make any promises you can't keep. The board meeting is a good time for re-establishing with the public that you as board members set policy. The staff carries out that policy. That message comes across loud and clear when the board president tells a concerned citizen, "We will ask the superintendent to have a staff member look into that matter and get back to you."

If, in spite of your best efforts, they storm the gates ...

- Do whatever you can to ensure the public knows you welcome their comments, even if the comments are likely to be critical. Move the meeting to a larger room if needed, bring in extra chairs, etc. These patrons are interested in your school district; let them know you welcome that interest.
- Try giving a group of critics the option of meeting with someone who can give them more time than they would get airing their complaints during an open board meeting. If a delegation arrives at the board meeting with a unified complaint, they may be happy to go into another room with an assistant superintendent and have that person's undivided attention for as long as it takes to discuss the issue. If the complaint is about transportation, the transportation director can offer to hear from the group in another room. If it is about an elementary school, the principal may be able to listen to the problem and make suggestions or ensure action will be taken. If this happens and the delegation is satisfied by the response they get, they usually do not feel the need to disrupt the board meeting.
- Don't argue. Arguing with angry people or giving them more "facts" just makes them angrier and causes escalation of the situation. The best course of action is to just listen, thank them for their input, thank them for their interest and concern and outline the process that will be followed in examining or resolving the situation.
- Start the meeting by expressing appreciation for the interest of those attending. "I'd like to call this meeting to order and in doing so, welcome all of the citizens attending the meeting tonight. We certainly welcome your interest in the agenda items on tonight's board meeting."
- Follow the public forum procedures established in your board policy. At the start of the open forum, it's appropriate for the board president to comment and help members of the audience understand that while public input is important to you, the board has established guidelines that will be followed tonight, as at all board meetings. Review those guidelines with the audience (as in, each speaker will be given up to 3 minutes to speak, etc.).

- Ensure that members of the board, as well as members of the audience, are clear that the purpose of the open forum is for the board to hear from the audience. Board members will not respond to questions or concerns posed during the open forum. Instead, the board may consider what, if any, actions are appropriate (such as, asking the administration to research an issue).
- Remind members of the audience that although there are parameters for speaking tonight, as board members you welcome their comments outside the board meeting at any time.
- As the open forum/public comment time concludes, the board president can look for areas of agreement and point them out. Example: “We’ve heard several concerns expressed tonight on varying sides of the issue. What’s clear to me is that we all agree that we want the best learning environment for our students.”
- Don’t panic. Remember, your first duty is to serve all students. If it is not absolutely necessary to make a decision for or against the issue of the moment, don’t vote that night.
- Listen. Give your critics a fair hearing and treat their concerns with respect and sensitivity. Pay attention to your body language to shown openness and attentiveness.
- If the crowd is noisy, deliberately lower your voice and resist the temptation to raise it. The calmer you remain, the greater the likelihood that the audience will remain calm as well.
- If the crowd becomes so noisy or attempts to interfere with the board’s work to the extent that the meeting becomes unproductive, the board president can call a recess. A sample statement might be: “This board has a duty to conduct business on the agenda this evening. As audience comments are interfering with our conduct of business, we will take a 10-minute recess in order to allow all of us to resume appropriate meeting decorum.”
- In extreme circumstances, a citizen may be escorted from the building if they are physically threatening or using inappropriate language, for example. The board may not ask all citizens to leave, however.
- Be prepared for personal attacks on your character, integrity, professional ability and personal beliefs. Often people attending a board meeting in a time of controversy can become emotional and say things about an elected official that are not productive. Maintain your cool. Never personalize your comments. Keep your remarks objective and professional.

After the dust settles ...

- Let people know what happened regarding their areas of concern. Write letters to those who contacted the board about an issue and let them know how the issue was resolved, how the decision was made and why the board decided as it did on this particular issue. It is especially important to include the key communicators mentioned above in this type of communication so they can help you provide accurate information and discourage the spread of unfounded rumors.
- Take time to debrief and learn from the experience. Analyze what went well, why it went well and what you might have done differently.

Tools You Can Use: Statements that May Stop Disruption

“As a board we respect that you have a serious concern and want to be heard. But we have a duty under the open meetings law to discuss only items on our stated agenda. I am going to direct the superintendent to meet with you or arrange a time to meet with you outside this meeting. This board will now move on to discussing Agenda Item # X on Topic Y.”

“This is a meeting of the board and the board is obligated to conduct its business in an orderly and focused way. The meeting is open to public observation—and the board welcomes that. We do, however, have an obligation to the students of this district to continue with the scheduled business of this meeting. I will expect that observers of this meeting are mindful of not interfering with the board’s operation.”

Serving as Media and Community Spokesperson

A primary role of the board president, other than to run meetings, is to be the voice of the board, representing the collective will of the board to other community boards, commissions and to the public, including the media.

The board president can't be afraid to speak for the board: The board president, by choice of the board, becomes one of two spokespersons for the school district (the other being the superintendent).

Serving as board president provides an opportunity to advocate for the needs of students, to promote the ideals of public education and to build community understanding of educational issues. A proactive board president seeks out opportunities to inform and communicate with the public on behalf of the board and the district.

But serving as the board's spokesperson sometimes requires the ability to set your personal opinions aside. A common concern for board presidents is that they feel they lose their right to free speech when they become board chair. This is just a perception, since no one can stop a school board member—chair or otherwise—from speaking out on issues. However, a conscientious board president thinks twice before expressing an opinion.

The reason is simple. When the board president speaks on an issue, the public, press and others assume the chair's statement is the position of the entire board. Great care must be taken not to give the impression that the opinion of one board member is that of the entire group, or even a majority of the board.

The news media will find many opportunities to request information from you as board president. Both the reporter, and the public which reads the articles, will assume that your comments are those of the entire board. When the board is divided on an issue, it's important that the president does not misrepresent his or her opinion as that of the entire board.

Our best advice is to be very cautious to clarify when you are speaking as an individual and when you are speaking for the entire board. When in doubt, try to refrain from commenting where you know it will cause a conflict with other members of the board.

Tips for Working with the Media

Serving as your board's key spokesperson with the media is likely one of your most challenging spokesperson roles. Most boards designate the board president as the spokesperson for the board with the media, and the superintendent the spokesperson for the school district. As board president, it's your responsibility to respond to inquiries from the news media about board actions or activities.

The board president must recognize the value of and support open, fair and honest communication with the news media and work to maintain a cooperative relationship with reporters.

General Guidelines

- Get to know your local reporters, their deadlines and the type of stories they cover. Make sure they are familiar with your district and with you as board president. When you're new to the presidency, set up a time when you and the superintendent can meet with reporters who cover the board meeting. Ask how you can be of help to the reporter. Make sure reporters have your contact information.
- Review with the board your policy on dealing with the media that defines designated spokespersons for the district. Make sure everyone understands your board's practices for responding to media inquiries. Individual board members do not give up their First

Amendment rights and can't be prevented from talking with the media. Your board policy should clarify, however, that the board president is the official spokesperson for the board.

- Respect reporters and editors as professionals. Most reporters will deal with you honestly if you are honest with them.
- You may be asked to comment on an issue about which the board has not yet taken a position. If this happens, carefully choose what you say and emphasize that your opinions are not those of the entire school board. If the issue is sensitive, decline to comment until you are sure of the board's position, even though you have strong feelings about a matter. Promise reporters that you will get back to them when you can answer their questions, and then do so.
- For most board presidents, the tips and guidance in this handbook will provide plenty of support. If your district receives a lot of press scrutiny and you are frequently interviewed—whether routinely or due to a controversial issue—call IASB for advice and counsel to refine your media relations skills.

When a Reporter Asks for an Interview:

- Be available--return all phone calls as soon as possible.
- Ask questions: Ask the reporter to tell you about the story they are covering the kinds of questions they would like answered.
- Politely refer calls about building or district issues to the superintendent, clarifying that the superintendent is most knowledgeable about those issues. Remind the reporter that you are happy to respond to questions that relate to current board business or action.
- Take time: If you need time to gather facts and information or would like time to reflect/prepare, tell the reporter you'd be glad to help but need some time to prepare. Be willing to work around the reporter's deadlines, of course—but most times you'll be able to help the reporter while having time to prepare yourself to do a good interview.
- Review any background information and gather printed information to provide to the reporter.
- Anticipate probable questions and plan your responses. Prepare yourself to answer the standard who, what, when, where, why and how questions. Also anticipate the worst questions you could be asked and plan what your response will be.
- Consider the three major points you'd like to make. These are your **key messages**.
- For broadcast news: Take a look at the location and your appearance. Avoid anything that will distract from your message or credibility.

During an Interview:

- Concentrate on communicating your key messages. Illustrate key points with personal experience or anecdotes.
- Always speak in plain English. Avoid education jargon.
- Keep your answers brief and to the point. Some of the worst "mistakes" come when you ramble.
- Always be honest. Never lie or mislead.
- Admit when you don't know an answer—offer to get the answer and call the reporter back. Then do it!

- Three acceptable responses to a reporter's question: I know and I'll tell you. I don't know. I know but I can't tell you. Use the first most of the time. When you say I don't know, try to find out and get back to the reporter. The last response--I know but I can't tell you--should be used only rarely, as in cases of student confidentiality.
- If you don't want to see it in print, don't say it. Always assume that the microphone is on or that the reporter is taking notes, even if you don't see a notebook.
- Know and follow the open meetings/public records laws.
- Never say "no comment."
- Relax, stay calm and be yourself. Show enthusiasm and smile. If you get angry, don't argue with the reporter. Count to 10 and calm down. Take time to think before you answer a question.
- Don't tell the reporter how to write the story and don't ask to see a story before it is printed.

After the Interview

- If a mistake is made in a story, consider whether it's worth troubling over. If you decide it is, point it out politely and professionally to the reporter. Always point out factual inaccuracies, but remember your goal is to keep them from being repeated, not to belittle the reporter
- Remember, reporters often don't write, or have any control over, the headlines on their stories.
- Tell the reporter he or she did a good job on a story, and don't be afraid to put it in writing now and then with a copy to the reporter's boss.

When Dealing with a Negative News Story:

- Understand that controversy is news. Reporters have a job to do, and covering controversial issues is a part of it. Your job is to help them do it in a fair and balanced way that gets the district's position out.
- Don't try to cover up bad news. Be the first with good news and bad.
- Remember, the story is going to be covered. If your position isn't represented, someone else will frame the issue. Do you want to provide the context, or do you want to allow it to be provided by a passerby?
- Use a single spokesperson so the facts are consistently portrayed.
- Don't lecture the reporter about how this story will "hurt" education or the school district.
- In a controversy, it's unlikely you will have all the answers, but there is always SOMETHING to be said. Example: "We take this issue very seriously and are looking in to it."
- Don't say what you don't know. Stick to the facts—but make sure you have the facts correct! Don't speculate or inject personal opinion or guess what might have happened. Say what you *know* and stop.

School Board Meetings and the Media

When building a good working relationship with the reporters who cover your school board meetings, it pays to make their job as trouble free as possible. Ideas on how to accomplish that include:

1. Ask your superintendent to provide full agenda materials to reporters as far in advance as possible. There is little value in withholding the agenda until the last possible moment just because a controversial item is scheduled for discussion.
2. Provide reporters with all backup materials that are not confidential documents. If possible, get it to them in advance of the meeting. If not, be sure you have the materials in hand to present to those reporters who attend before the meeting begins.
3. Provide a place for reporters to sit (and set up cameras) during the meeting, particularly those reporters who regularly attend the board meetings.
4. As board president, approach reporters before the meeting or at a break if the reporter arrives after the meeting starts. Provide a warm greeting, ask if the reporter has any questions, and let the reporter know you'll be available after the meeting for any comments or questions.
5. Be prepared to provide background information on an agenda item and have appropriate staff available for interviews if the topic warrants it.
6. Remind board members and the superintendent (before the meeting) that reporters are in the audience and that joking or facetious comments can and likely will be presented out of context.

Top Tip: S.E.C.S.

Create your own sound byte by remember the S.E.C.S. acronym: Statement, Explanation, Conclusion, Stop. You'll have a strong, effective message to the media in seconds.

STATEMENT—State your position briefly.

EXPLANATION: Describe a few supporting facts/activities.

CONCLUSION: Close with future actions/expectations.

STOP: Avoid rambling!

Examples:

Statement: We believe the new policy will define expectations for attendance.

Explanation: It clearly states the consequences for unexcused absences.

Conclusion: And we hope to see a drop in truancy as a result.

(STOP)

Statement: Like everyone else in our community, we are extremely concerned about violence in the schools.

Explanation: Conflict management skills are taught to students at all grade levels, and our staff works closely with the local police in letting students know the penalties for carrying weapons.

Conclusion: Through our new community coalition, we're asking for the community's participation in keeping our students safe at school.

(STOP)

Top Tip: The Bridge

Remember “The Bridge.” Briefly answer a reporter’s questions, then *bridge* to your positive points and examples.

Possible bridges:

“The real issue is...”

“You might also want to know...”

“Let me put that in perspective...”

“However, our research shows...”

“That’s one way to look at it...”

“There’s something equally important to consider...”

Recommended Reading for Board Presidents

The Speed of Trust: The One Thing that Changes Everything, Stephen M.R. Covey

Robert's Rules of Order Newly Revised, 10th Edition; Da Capo Press, 2000.

Robert's Rules of Order Newly Revised In Brief, Da Capo Press, 2004.

Resources from IASB

IASB School Board Member Handbook (available for free at www.ia-sb.org)

Leadership for Student Learning: The School Board's Role in Creating School Districts Where All Students Succeed

Open Meetings and Public Records Manual

Case Study #1

Situation:

You notice that a previous decision by the board to close an elementary school keeps “coming up” in board member discussions about other agenda items. Two members especially have said some things at the board table that give you a sense they are doubting the wisdom of the decision. No one, however, has come right out and pushed to change the decision. You were under the impression that this issue had been resolved previously, but now you are wondering if it has.

Here are three possible options for moving forward. Identify the pros and cons of each option.

- A. Bring it up at the next meeting. Be as specific as you can. Express your concern about appearing to waffle on the issue. Describe what’s at stake financially for the district at this point. Remind the board of the importance of supporting decisions that have been made and put the issue to rest.

- B. The next time the issue emerges, take the opportunity to seek clarification—Is this issue still a concern for the board? If not, why is it being brought up? Are there community concerns as well? Help board members lay on the table a “hidden” issue that could fester if it’s not addressed.

- C. Don’t worry about it. Put your energy behind focusing the board on current goals and priorities. Eventually, the issue will be forgotten and no hackles will be raised.

What are some other things a board president might do in this situation?

Case Study #2

Situation:

Your board meetings are short and there is little disagreement at the board table. You feel the board is “on the same page” about a lot of things, and you know they are proud of their efficiency and professionalism at the board table. Things are going well in the district and you’re confident in your superintendent’s leadership. But talk is getting louder and louder in the community that you are just a “rubber stamp board.”

Here are three possible options for moving forward. Identify the pros and cons of each option.

- A. Encourage members of the board to ask questions for clarification (even if they’ve already secured the information) and to state their rationale for decisions, in order for the community to know that questions are being asked and to understand why the board supports recommendations by the superintendent.

- B. Build in time to the board agenda to hear about the programs going on in the school or to have educational discussions with the idea of making a good school even better.

- C. Hold a public meeting to discuss the community perception of your board. Make the meeting one with give-and-take between the board and the community in an effort to gain better understanding.

What are some other things a board president might do in this situation?

Case Study #3

Situation:

The outgoing board president is ending 9 years of board service, including the last 6 years as board chair. He is highly regarded as one of the best board presidents in recent history, and at his last meeting, members of the board and staff celebrate the stability and calm he has brought to district leadership, including his diplomatic and reflective approach. While you have great respect for your departing colleague, you also see that a firmer hand in leadership might be needed.

There has been little real progress on some key education issues, and you're concerned that "stability" might really be "stagnation." You'd like to bring some urgency and focus to bear to get things moving around improving academic achievement and addressing some real fiscal issues.

Here are three possible options for moving forward. Identify the pros and cons of each solution.

- A. Spend some time getting to know each board member. Make a point of asking each member of your board what improvements could be made to make a good district even better. Sit down with the superintendent and get her read on the biggest areas of needed improvement. Look for areas of common ground and build some momentum on the board/superintendent team.

- B. Use an upcoming agenda item of reviewing student achievement data as an opportunity to facilitate the board in identifying some key areas of need based on the data. Seek consensus on the board that they direct the superintendent to coordinate a review of the data with the administrative team and your community advisory committee with the expectation that they also identify the biggest gaps in academic achievement. Use that as the foundation to turn goal-setting from "what we do to comply with No Child Left Behind" to one with meaning.

- C. Capitalize on the fact that your board colleagues urged you to take on the role of board president because you've already shown your desire to initiate improvement. Improving student achievement and dealing with funding concerns have been "on the table" for some time. Let the superintendent know you expect these issues to become front and center on the board's agenda—and on hers.

What are some other things a board president might do in this situation?

School Board Presidents Survey 2009

Help IASB strengthen this handbook and develop additional tools to support board presidents by completing this survey during the Oct. 27 Board Presidents ICN session, or by completing it and returning it on your own (see address on back). Thanks!

In your opinion, what skills or practices are most important for an effective board president? Why?

What “top tips” or tools can you share for other board presidents? What has worked for you?

What would you like more help or information on?

As IASB plans future supports for board officers, we'd like your input. What would you like additional information or help on? Please be as specific as possible.

Workshop Evaluation

Please complete the items below if you attended the ICN session Oct. 27.

What was most helpful about the workshop?

How could the workshop be improved?

Optional

Name: _____

School District/AEA: _____

Complete this form and turn it in to the host at your Oct. 27 ICN site or send to:

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You may also e-mail comments or suggestions at any time to dgreen@ia-sb.org.