
AASB BOARDMANSHIP SERIES

THE SCHOOL BOARD PRESIDENT'S HANDBOOK

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FOREWORD

The School Board President's Handbook is one of the booklets in AASB's Boardmanship Series. The series was conceived to provide school board members with additional information on specific issues related to governance that are not addressed in detail in other AASB publications. This booklet discusses the role of the school board president. It is designed to give all board members, particularly those serving as board president, a basic understanding of the president's responsibilities and relationships with other board members and the superintendent. However, the suggestions here are intended to be guidelines. Each school board must determine its goals and expectations of the board president.

INTRODUCTION

State law requires each school board annually to elect a president and vice president. The code charges the president with presiding at all called meetings of the board, but it gives little other direction as to the president's duties. The role and responsibilities of the school board president discussed in the book are those which are implied by state law or those which traditionally are assumed by the leaders of similar governing bodies.

1: THE PRESIDENT'S ROLE

You're a leader in your community.

You're a leader on the school board.

As a board member, you have placed the good of the board above your individual interests. You have worked closely with other members to solve mutual problems and attain common goals. Your peers recognized your ability to take charge and make things happen. They value the time and talents you have devoted to building a better school system for children, and they have elected you as their president.

Congratulations! You have earned the challenge and responsibility of leading your school board and your system.

PRESIDENT AS LEADER

Just as a community looks to its school board for wise decisions, firm commitments and steady achievements, board members look to their president for strong leadership. Therefore, you need to have a clear understanding of the leadership role you play.

You were elected president because you are trusted and your opinions are valued. You can motivate others to take constructive action. These same qualities and skills will help you in your work with the board and the superintendent.

As board president, you provide the leadership to encourage your members to pool their resources and fulfill the board's responsibilities. Your board's role is to establish its position on current issues, set goals, formulate policies and authorize programs that will meet present and future needs of students. Together, you and your fellow board members possess the wisdom for sound governance.

In cooperation with the superintendent, you lead development of board goals for your schools. You and your superintendent, working together, encourage the effectiveness of the board and the success of the superintendent. The two of you are the most influential leaders in your school system.

RESPONSIBILITIES

Applied leadership skills are needed to carry out the responsibilities of a school board president. In particular, you:

- Chair your board of education and preside at all of its meetings.

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- Ensure members are kept fully informed about the general state of the schools and the issues affecting operations. Your superintendent and staff are the resources you call on for accurate, reliable information.
 - Work with the superintendent and board to plan and develop policies and programs that provide educational opportunities for students.
 - Support and defend the policies and programs adopted by the board, setting an example for your fellow board members to follow.
 - Consult with the superintendent on board policies, programs, finances and public position statements. You and the superintendent are the leadership links between the board and the daily operation of the schools.
 - Ensure the board gives authority to the superintendent for administration of the schools and formally evaluates its own performance and that of the superintendent.
 - Lead the board's annual review of the effectiveness of the goals for the system, policies of the board, performance of the staff and achievement of students.
 - Ensure your school system is financially sound, adheres to its budget and follows proper financial procedures, including a financial audit.
 - Lead, with the superintendent, the development and adoption of the annual budget and keep the board aware of the financial status of the system.
 - Appoint ad hoc committees and task force chairpersons and members; review the purpose of each committee; give directions when necessary; provide regular opportunities for committee reports to the board; and dissolve each committee at the end of its assignment.
 - Encourage free and equal expression of opinions by all board members and seek communication between the board and everybody it represents.
 - Provide the community with an official avenue for relating issues and concerns to the board.
 - Report to your community about school operations and board actions through speeches, letters and publications.
 - Represent the board when speaking to the media, legislative bodies, related organizations and the public.

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- Lead the board to use its members' combined wisdom in making decisions and refrain from manipulating the board or staff to effect your personal interests.
 - Organize your board's work: electing officers, orienting members, establishing the board-administrative team, and adopting policies, rules and procedures which will guide the board and the school system's operations.
 - Encourage all board members to educate themselves on being good board members, the needs of the school system and alternatives to solving problems and governing the school system.
 - Keep your board aware of its commitment to work as a unified body whose greatest concern is the educational welfare of the students attending your schools.

Your leadership qualities helped get you where you are today – a leader in your community and a leader on your school board. Now you have this special challenge of the board presidency. You've received a high honor, and with proper preparation and understanding of your role, you'll meet this new responsibility.

2: PRESIDING AT BOARD MEETINGS

You've sat through some meetings that were endless and accomplished nothing and others that were short voting sessions that left you wondering what they were all about. Somewhere between these extremes, good meetings are conducted, and the skills of the board president make the difference. The keys to good meetings are planning and effective leadership. As board president, you are responsible for both.

School board meetings set in motion your school system's operations. Board meetings frequently produce major, influential decisions. Your board's behavior in meetings – individually and as a whole – sets a model that is followed by citizens and employees. Citizens as well as board members view board meetings as their principal way in which the board as a body can be addressed, influenced and assisted in making decisions. The president determines the productivity and atmosphere of the board meeting. Your knowledge and skills applied with common sense and good judgment create the foundation for a productive meeting. Learn and use a set of practical rules. Knowledge of parliamentary procedure is essential; its application should be businesslike but not limiting. Keep discussions to the point, and encourage all who have valuable ideas to express them. You also should umpire the contests between proponents and opponents and vote on all motions. As president, you encourage individual members to be a cooperative, productive school board.

Your superintendent, likewise is very important to productive meetings. The superintendent cooperates with you and the board in planning and conducting meetings. The board and superintendent should agree on the role of the superintendent in meetings.

Your board will benefit from an adopted set of policies to guide and direct the planning and operation of meetings. Specific statements should direct the agenda, rules of order, standard order of business, minutes and procedures for conforming with applicable laws. Publishing these policies will help achieve proper use.

The first steps in preparing for meetings are scheduling meetings and preparing the agenda.

SCHEDULING BOARD MEETINGS

In general, you are free to schedule board meetings and work sessions as needed, but state law does address board meeting dates. County boards are required to conduct at least five meetings a year in addition to an annual meeting in November. In Alabama, city school boards are required to

conduct the annual meeting during the first regular meeting in May, unless a different date is prescribed by local act. In addition, school boards are required by state law to hold two public hearings prior to adopting their annual budgets (Code of Alabama 1975, § 16-13-140). When scheduling board meetings, consider the ability of parents and staff members to attend. School board members should receive notice of each regularly scheduled board meeting, including an agenda, at least 24 hours prior to the meeting or whenever board policy specifies. In the case of special or emergency meetings, the superintendent, if at all possible, should try to notify board members 24 hours in advance. State law requires public notice specifying the time, date and location for all meetings. When this notice must be posted will depend on the type of meeting. A preliminary agenda also should be posted as soon as practical. In addition, individuals may request meeting notice. (For more information, see AASB Boardmanship Series booklet *Public Meetings and Public Records*.)

THE MEETING AGENDA

The agenda's purpose is to focus attention on specified topics, keep discussion to the subject and produce results efficiently. The superintendent and president jointly prepare the agenda, with the superintendent responsible for putting it together and the president for consultation and advice. The agenda, once adopted by the board, becomes the plan for the meeting, and the president and superintendent should ensure it is followed.

Agenda issues to be considered include: who prepares it and when; which background materials are to be included; what and how items get on the agenda; where and when meetings are to be regularly held; and how and by whom items are added after posting.

RECOMMENDED AGENDA PRACTICES

There is no "right" pattern for a meeting, but an agenda incorporates certain essential items. When developing an agenda, you should consider the following points.

- Number of items on each agenda. Leadership in this planning stage will determine the length of the meeting. A two-hour meeting should provide sufficient time to conduct business.
- Policy governing items placed on the agenda. A responsibility of the president and superintendent is to ensure items are placed on an agenda only after the board and staff have sufficient information for deliberate,

rational action. Surprises never must be permitted. The board never should take action until it has given due consideration of a matter based on all available information.

- Identification of items. Action items and information items require different forms of preparation and action, so each should be distinctly marked on the agenda. In addition, the identification on an agenda should include sufficient explanation for strangers as well as board members to be able to identify the item under consideration.
- Public comment. Visitor comments and questions are valuable to the board. The agenda should provide for hearing visitors, and the earlier on the agenda, the better. Board policy should clearly define the method by which members of the public are allowed to speak.
- Future agenda items. An item at the close of each agenda can provide an opportunity for board members to request future agenda items, but also should specify other options for getting items on agendas.

Consideration of other issues during agenda preparation will aid a meeting's progress and success. It usually is best to schedule items requiring concentration, analysis and deliberation by board members, significant matters and visitors and delegations early. Controversial items should be arranged between non-controversial, and routine staff reports and business should be in the latter portion of the meeting.

The president is empowered by policy to ensure the agenda is observed. The members expect it, and they respect the presiding officer who does it. Strict adherence to the agenda is a good practice to follow. Finally, keep supplemental agenda items to a minimum. Frustration occurs when board members do their homework and come to a meeting only to find a number of items added after the agenda was distributed. Additions should be the exception rather than the rule. If the item can just as well be dealt with in a subsequent meeting, it belongs on a future agenda.

CHAIRING MEETINGS

Your style of presiding is as important as the rules you apply. While you must know the rules, you should apply them with common sense and logic. Your manner of relating to people strongly determines the harmony of the group. Application of rules is respected when done with firmness and fairness. Everyone wants the meeting to be run well and to be fruitful. Rules and guidelines for effective meetings come from years of experience. Important points for consideration when presiding include:

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- Starting on time;
 - Speaking so you can be heard by everyone;
 - Welcoming members and the public to the meeting;
 - Introducing the school board and superintendent;
 - Following the agenda;
 - Delaying discussion and voting until a motion and second have been made;
 - Encouraging all members to express themselves;
 - Leading progress through the agenda in order to conclude the meeting in a reasonable period of time;
 - Repeating all motions in their entirety before taking a vote;
 - Calling for an affirmative and negative vote on all motions, except courtesy motions;
 - Announcing the results of the vote and the action to be taken;
 - Ensuring accurate minutes are kept to document actions;
 - Asking someone to preside while taking the floor to speak on an item;
 - Adhering to the adopted rules of order; and
 - Declaring the meeting adjourned.

See page 12 for a brief explanation of parliamentary procedure.

OBSERVING A TIME LIMIT

Establishing a time limit for all meetings generally results in more productive meetings. More business is conducted in less time, and members do not become frustrated with extended or repetitious debate. When establishing policies and procedures for meetings, the board should agree on a maximum time for regular meetings and affirm its support for the president in holding the board to its commitment. While meetings may extend past the targeted adjournment time, the goal does tend to make the meeting progress more efficiently.

USING GROUP DECISION-MAKING

Effective decision-making by a board voting in public meetings is realistic and possible. A few basic steps can be taken to reach a decision with some assurance it represents the mind of the board as a whole and it will be supported. The president, any member of the board and the superintendent can influence the board to cooperate by observing these steps:

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- Defining the problem;
 - Suggesting alternative solutions;
 - Testing alternatives; and
 - Choosing among alternatives.

Other steps follow the decision – planning, action and evaluation. The superintendent makes plans from a decision, initiates action and evaluates actions. Results are given to the board for review of the decision and any changes necessary. Completion of each decision cycle enhances the board’s ability to make decisions on future items.

EXECUTIVE SESSIONS

The principal reason for open meetings is the public’s right to know what its governing board is doing. The provisions for executive sessions enable boards to receive information on certain matters which are not suited to public discussion. The president’s responsibility is to ensure board adherence to the letter and spirit of the law. And, it is the president’s job to develop public trust in the board’s handling of executive sessions. Once in an executive session, the president presides over the session, but no action can be taken nor should any minutes be taken. State law limits executive sessions to the discussion of specific matters and specify requirements related to convening executive sessions and public notice. These limitations and requirements are discussed in detail in the AASB Boardmanship Series publication *Public Meetings and Public Records*. The board president should be familiar with the state law to ensure executive sessions comport with its requirements. Generally, executive sessions must be conducted within an open meeting because in most cases, the board must approve a motion to conduct the session based on one of the grounds specified in the law. The president also must announce when the board is expected to reconvene following the executive session.

After the executive session, the president usually reconvenes the open meeting, and in open session, presides over deliberations and actions which may result from the executive session. If there is none, the president announces publicly that no action is to be taken at that time. If no other agenda items exist, the president adjourns the meeting.

Public reaction to executive or closed sessions is crucial to the board’s credibility. Consultation with the school board’s attorney can prevent problems through adequate planning and proper conduct before, during and

after executive sessions.

Executive sessions are permitted by law for discussion of sensitive subjects that should not be discussed in public. Board members and other participants in closed sessions should respect this code of confidentiality. Otherwise, the value of the executive session is lost and harm to persons and the board can result.

MAINTAINING ACCURATE MINUTES

Recording and maintaining accurate minutes are a must for every school board since the minutes of official board meetings, approved and written, become legal documents. A board policy should direct the complete handling of minutes. Some invaluable practices proven are listed here.

- Assign responsibility for taking notes and recording action at board meetings to the superintendent, who is secretary to the board. He or she may assign a staff member to assist.
- Take minutes for all public meetings. Minutes include a record of each board action, plus names of those voting for and against each question or the word unanimous.
- Summarize lengthy discussion or omit it altogether.
- Carefully word motions before they are accepted and seconded, and record them in the minutes exactly as the board acted upon them.
- Record only what is necessary. Contracts, petitions and lengthy resolutions should be briefly described and identified in the minutes and maintained in official files elsewhere.
- Approve at the next regular official meeting the minutes as presented or modified.
- Assign a staff member to maintain the adopted minutes in a secure location.

HANDLING DELEGATIONS

A public image of both the board and the school system is presented at meetings. Because well-informed citizens tend to support school board plans and programs, the public should be encouraged to attend meetings. Visitors should be made to feel welcome, and they should be treated courteously. The president's manner sets the example for the board to follow.

Individuals and delegations have a right to attend meetings of their public boards, and boards have a responsibility to hear them. The board can hear delegations and individuals and still conduct business orderly. To accommodate such groups consider these points:

- Have a board policy that clearly defines how members of the public may be heard at board meetings.

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- Have an agenda item for hearing individuals and delegations and receiving petitions early in the meeting.
 - Ask all persons wishing to address the board to sign up before the meeting, giving their names, addresses and phone numbers.
 - Ask that specific complaints that have been registered but no satisfactory responses given be put in writing and ensure its discussion on a future agenda.
 - Speak for the board as its president; minimize board member interaction with members of the audience; and stop immediately any debate among members of the audience or between members of the audience and the board.
 - Ask the audience to direct all comments to the chair.
 - Treat visitors courteously, but be firm in adhering to the rules. Keep the board – not the audience – in control of the meeting.
 - Thank visitors for speaking to the board.

Presiding over board meetings is no easy job. It requires many hours of preparation. It demands your concentration every minute in session and keeps you on your toes. It can be one of your most concrete rewards as a

THE CONSENT AGENDA

If your school board meetings go on for hours, a consent agenda may be just the vehicle to speed things along allowing more time for items that require attention. If the school board and superintendent agree, routine items such as minutes, monthly bills, field trip requests and schedule changes can be listed individually on the agenda but grouped together as one agenda item to be approved with a single motion and no discussion. This method not only reduces the number of motions needed in a meeting, but also saves time since the board agrees not to discuss consent agenda items. Minutes, too, are shortened since there are fewer motions to record.

It works like this. The board president and superintendent jointly determine which items are administrative, routine, or non-controversial and list them on the proposed agenda as tentative consent items. These items are sent to each board member well in advance of the meeting. At any board member's request, an item is removed from the consent section of the agenda and placed as a regular action item for full board discussion. All items that remain on the consent agenda are handled with a single motion and the board president asks, "Do I hear a motion to approve consent items A through M?"

One motion resulting in approval of multiple items.

PARLIAMENTARY PROCEDURE

Your board formally should adopt procedural rules and parliamentary procedures for governing its meetings. As president, you should become familiar with these rules and with parliamentary authority, remembering to use common sense in their application. *Robert's Rules of Order, Newly Revised* is a practical and widely used authority. A copy of the board-adopted authority should be available for use at all meetings.

Various parliamentary terms are defined and summarized here.

Call to Order. At the posted meeting time, the presiding officer determines whether a quorum is present and, if so, calls the meeting to order. If the president is absent, the vice president presides.

Quorum. A majority of the members of the board constitutes a quorum for meetings.

Lack of Quorum. If the presiding officer determines at any time that a quorum is not present, he/she either declares the meeting recessed until a quorum is present or declares the meeting adjourned.

Acceptance of Motion. No motion can be made until the item is reached on the agenda and called for by the presiding officer.

Main Motion. A main motion is made in substantially the following manner: "I move that...". A motion can be made and debated only by a member of the board. Non-members may be asked to speak.

Out-of-Order Motion. A motion which does not relate to the matter before the board or is a main motion when another main motion is before the board is out of order and cannot be made at that time.

Second. Under standard procedures, no motion should be discussed or voted on unless a member other than the one making the motion has given a second to the motion. However, *Robert's Rules of Order* has special rules for small boards and committees (fewer than a dozen) that state a second is not required prior to discussion. No second is needed for adoption of a committee report.

Revision of Motion. At any time before a vote is taken on a motion, the person making the motion may revise the wording. If the revision is accepted by the second or if the motion as revised is seconded by another member, the revised motion is before the board.

Withdrawal of Motion. At any time before a vote is taken on a motion, the board may vote to withdraw it. A second is usually not required. If the motion is withdrawn, no vote can be taken on it.

Amendment to Motion. At any time before a vote is taken on a motion, any member may move to amend it. The motion should state the amendment, and a second must be received before it can be recognized by the president. When recognized, the motion to amend is the business before the board. The president then

calls for discussion, which is limited to the proposed amendment. If the proposed amendment receives a favorable majority, the main motion stands as amended and further discussion is only on the amended motion.

Privilege of Board Members. No board member who is speaking to the board should be interrupted by any person except with the member's consent. If the speaking member yields to another person, the president again recognizes that board member immediately at the conclusion of the other person's remarks.

Termination of Discussion. The president may close discussion when he or she determines there has been sufficient discussion to consider all relevant factors. Discussion is closed unless there is an objection from a member or a motion and second followed by two-thirds vote to keep it open.

Call for the Question. At any time during the discussion on any motion, any member may call for the question. If that call receives a second and approval by two-thirds of the board, the president shall immediately call for the vote.

Vote. The vote on all matters shall be made in person. As a member of the board, the president should vote on every motion, not just to break ties. The president shall announce the result of the vote immediately.

Abstention. Any member may abstain from voting at any call for the vote. Such member, who is present at the call, is counted as present to determine presence of a quorum. A member should abstain only when there is a conflict of interest.

Change of Vote. A member may change his or her vote if he or she announces the change before the president announces the results of the vote.

Favorable Majority. A motion is adopted and action of the board taken when a majority of the full school board votes in favor of the motion.

Defeated Motion. A motion which did not receive a favorable majority is a defeated motion. A tie vote defeats a motion.

Statement for the Record. Any member may request the secretary include in the minutes a statement for the record containing his or her statements, explanations, or other materials. Such a request must be made before the adjournment of the meeting.

Motion to Adjourn. When the agenda is completed, if there are no objections, the president may declare the meeting adjourned. If a member moves to adjourn the meeting, the president shall call for a vote, without requiring a second. Once the motion passes, the president must declare the meeting adjourned.

The following charts define various motions that may be used during a board meeting

MOTIONS	Requires recognition	Requires second	Debatable
Housekeeping motions			
1. Adopt agenda	No	Yes	Yes
2. Amend agenda	No	Yes	Yes
3. Set time of meeting	Yes	Yes	Yes
4. Set time for adjournment	Yes	Yes	Yes, unless motion pending
5. Adjourn	Yes	Yes	No
6. Recess	Yes	Yes	No
Main motion, discussion			
1. Main motion (only one at a time)	Yes	Yes	Yes
2. Amend motion	Yes	Yes	Yes
3. Amend the amendment to motion	Yes	Yes	Yes
4. Substitute motion	Yes	Yes	Yes
5. Lay motion on table	Yes	Yes	No
6. Take motion from table	Yes	Yes	No
7. Postpone motion to specific time in same meeting	Yes	Yes	Yes
8. Postpone motion to next meeting	Yes	Yes	Yes
9. Postpone indefinitely	Yes	Yes	Yes

A GUIDE TO PARLIAMENTARY PROCEDURE

Amendable	Vote required	When motion is used or effect of motion
Yes	Majority	Sets order of discussion for meeting. Must suspend rules to bring item up out of order.
Yes	2/3	Usually only used to include urgent items not anticipated when agenda was set.
Yes	Majority	Required motion unless board meets at same time every month.
Yes	Majority	Should not be used if motion will shut off necessary debate or consideration of critical issues.
No	Majority	Should be used wisely for reasons stated above, but can be way to avoid action that is premature or unwise.
No	Majority	Mover should make sure recess is brief and isn't in violation of sunshine law.
Yes	Majority	Puts main issue on the table for discussion and voting. All other motions apply to main motion.
Yes	Majority	Refines or clarifies wording of main motion. Or may offer members alternate choice on key issue.
No	Majority	Same as above.
No, unless pending	Majority	Replaces poorly worded motion that is beyond amending.
No	Majority	Puts main motion aside temporarily with the provision that it can be brought up again when a majority so wishes. Often used when other items are more pressing or when the group wants to dispense with other items.
No	Majority	Brings a motion back before the body for action. No other motion can be under consideration.
Yes	Majority	Delays vote on main motion until more information is known or until more convenient time.
No	Majority	Same as above.
No	Majority	Kills the motion while avoiding a direct vote on the issue.

MOTIONS	Requires recognition	Requires second	Debatable
10. Refer to committee	Yes	Yes	Yes
11. Objections to consideration	No	No	No
12. Limit or extend debate	Yes	Yes	No
13. Return to main motion for discussion.	Yes	Yes	Yes
14. Division of the question (discussion)	Yes	Yes	Yes
15. Division of the question (voting)	Yes	Yes	No
16. Call for previous question	Yes	Yes	No
17. Withdraw a motion	No	Usually	No
18. Division of the house	No	No	No
19. Reconsider motion previously voted on	Yes	Yes	Usually
Other motions			
1. Rise to point of order	No	No	No
2. Rise to point of parliamentary inquiry	No	No	No
3. Suspend the rules	Yes	Yes	No
4. Raise the question of privilege (point of personal privilege)	No	No	No
5. Appeal to the chair	No	Yes	No

A GUIDE TO PARLIAMENTARY PROCEDURE

Amendable	Vote required	When motion is used or effect of motion
Yes	Majority	Gives the group time to learn more about an issue before voting.
No	2/3 in negative	Allows group to avoid an issue when it is considered undesirable to come before the group.
Yes	2/3	May limit either number or length of speeches made. Also may set specific time to cut off debate.
Yes	Majority	Puts aside discussion not related to main motion.
No	Majority	Allows body to discuss one issue at a time when a motion includes several independent issues.
Yes	Majority	Requires body to vote on each part of a motion one at a time.
No	2/3	Ends debate to obtain an immediate vote on motion.
No	Majority	Strikes the motion from the records of the meeting. Requires second when motion to withdraw is made by mover of original objection.
No	None	Requires a roll call vote or ballot to assure accurate count.
No	Majority	Permits correction of hasty or erroneous action to hear new evidence. Cannot be debated if original motion was not debatable. The motion must be made by persons voting on the prevailing side.
No	None	Allows member to call upon the chair for a ruling when he or she thinks rules are being violated.
No	None	Allows members to obtain advice from the chair on correct parliamentary procedure so that they might make an appropriate motion.
No		Allows members to consider something which is in violation of normal rules. Often used to bring up item out of order or item not on agenda.
No	None	Permits consideration of requests or motions relating to rights of the group. Often may relate to physical comfort or meeting arrangements.
No	Majority in the negative	Allows the entire body to take action on a decision of the chair. It has the effect of overruling the chair's decision.

3: WORKING WITH YOUR BOARD

The president's leadership perhaps is most obvious in chairing board meetings. But leading the board also involves moving the board forward; to accomplish new goals and to tackle new problems. One of the most important assets you can use to lead your board is your relationships with your fellow board members both in and outside of meetings. Each member brings to the board a unique combination of experiences, knowledge, contacts and commitments. Working cooperatively, the group has the wisdom in thought, purpose and vision that no single board member achieves alone.

Yet these very differences also can make cooperation difficult. Some board members might want their personal interests considered. Others may want to run the board for you or may have an "ax to grind." Conflict may arise and involve board members, you and the superintendent. At times, one or more members may want to run the schools, and occasionally, the superintendent may stray into policy-making. The president's responsibility is to channel these divergent views into a team spirit that places improving the school system first and foremost. Your job is to lead the board to take action, not to do it yourself. No single act or set of simple "do's and don'ts" will help you deal with all the variables on your board, but consistent, fair application of all the procedures and treatment of all board members will help your board deal with issues and conflicts.

ORIENTING YOUR BOARD

Each year, following election or selection of new members, your school system may have a new board which will work with either a continuing or new superintendent and administrative staff. The new board members have special information needs concerning policies, past practices and background in other areas.

During this part of the orientation process, you and your board members are responsible for explaining governance, such as policies and goals, with support from the superintendent. Administrative operations – budget, curriculum, taxation, regulations, procedures – may be covered by the superintendent and staff with board members providing assistance. Orientation to current needs and problems involves both new and continuing members plus the superintendent and staff. All share in this process in order to understand the job ahead and therefore provide effective solutions.

Effective solutions also depend on the organization of your board and administrative staff. This process includes:

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- Electing officers;
 - Appointing committees and task forces;
 - Establishing board meeting policies and procedures;
 - Adopting and affirming board policies, procedures, goals and plans;
 - Committing members and staff to cooperate as a unit;
 - Agreeing on the board superintendent-administrative team (management team) arrangement for making and using policy; and
 - Establishing systems for board and superintendent evaluations.

Your superintendent will be a valuable resource in planning and conducting this orientation and organization process. The Alabama Association of School Boards is also at your disposal, assisting with workshops, local in-service programs and publications. Consider, too, the many experienced board members in your immediate area who may be able to help you.

LEADING POLICY DEVELOPMENT

The business of your board is not to run the schools but to see that they are well run. This means the board sets the goals, standards and philosophy by which the schools are to be run and chooses criteria to judge whether they are being run well. All of this is done through policy, and the president's leadership is critical in developing policy. You should ensure your board has a complete, up-to-date policy manual. Policy decisions should be designated as regular agenda items so the board does not become trapped in "crisis" policy decisions. A specific policy should be adopted that will guide future policy development, implementation and evaluation.

Policy development is best approached as a team effort of the board and superintendent. The board can determine whether it will have a policy committee or function as a committee of the whole, but it should appoint the superintendent as policy coordinator.

As policy coordinator, the superintendent should be given the specific responsibilities for:

- Alerting the board to forthcoming policy decisions;
- Supplying background information;

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- Drafting formal policy language from the board’s expression of intent to review, amend and adopt;
 - Consulting with the appropriate groups and personnel affected by the policy as required by law;
 - Overseeing distribution of the adopted policy; and
 - Keeping the system’s policy manuals up to date.

POLICY HELP IS A PHONE CALL AWAY

Developing policy is the primary function of school boards. Policies must be fair and reasonable, but they also must be developed in accordance with state and federal laws, case law and sound business practices. AASB assists school boards in developing legally sound, practical policies in many ways.

Policy Bank. AASB maintains a library of individual school board policies in use throughout the state. If a superintendent or school board member needs ideas on policies dealing with a specific topic, AASB will send several sample policies to the interested parties. No recommendations are made, and the policies are available free.

Policy Analysis. This policy-by-policy analysis of your manual results in a report that identifies the problems in your manual and provides a guide you can use to update your policy manual or that can be the basis of AASB’s Policy Update Service. The report will identify policies that do not comply with current law and regulations and those which are duplicative or inconsistent with other policies or current practice.

In addition, the analysis will note the absence of required policies and make general suggestions related to format, presentation and organization.

Policy Update. The Policy Analysis service discussed above is included in the policy update and is the basis for revision of the board’s current policy manual. Based on the identified problems in your manual, AASB works with the board and staff to correct the deficiencies in the existing manual and to update the manual either through new or revised policies to ensure the manual coincides with current board operations and governance.

In conjunction with the superintendent's responsibilities, the board has several opportunities to shape policy as it is being developed when it reviews policy proposals as part of its regular meetings. In general, the board:

- Receives finished drafts from superintendent as an agenda item, discusses and makes needed revisions as a first reading;
- Receives finished draft after first reading as an agenda item, revises if necessary and adopts following the second reading;
- Receives as information the rules and regulations developed by the superintendent for policy implementation; and
- Notes for future agenda action the date the board will evaluate results of the policy and when it should be reviewed to determine continuing value.

AWAY FROM THE MEETING

The school board's authority is granted to the board – not individual school board members. Outside board meetings, you are citizens who are members of a board bound by law to take action only in official public meetings. Yet the actions of you and your peers outside meetings will affect the outcome of your meetings and your relationship with your community. The manner in which you treat board members and the extent you help them prepare for meetings can help to ensure the board's actions both in and out of meetings are complementary. The few rules listed here aid in enlisting the board's cooperation.

- Ensure all members receive the same information or communication at approximately the same time so no one feels left out or isolated.
- Encourage members to use the board-adopted procedure for handling complaints and suggestions.
- Contact and communicate with every member frequently and repeatedly.
- Ask for suggestions and recommendations for improvement of your leadership, the board and the schools; see to it that these are introduced to the board for consideration.
- Be consistent in your treatment of all members; show no partiality.
- Remind yourself repeatedly you are setting a model of behavior for others to follow.

DEALING WITH CONFLICT

Conflict naturally occurs within a group that has different values, interests and points of view. Unresolved conflict can tear your board apart. Your board will experience conflict of various types:

- 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
- Confusion about whose opinions are most valued.

Unless conflict is managed in some way, it will produce haphazard change. As 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 when it fails to recognize and work on conflict issues.

Change and conflict go hand in hand. Conflict changes a situation; the status quo continues it. There is a direct correlation between the rate of change in a school system and the amount of conflict. The faster the change, the more conflict can be expected.

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

- Recognize that conflict exists:
 - admit that there might be a problem; and
 - 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 and who feels the strongest; and
 - find out if the disagreement is over goals or over how to accomplish the goals.
- Identify the individual needs or wants: each person who is involved must have a clear idea of what the others involved want.
- Identify areas of agreement: More attention to possibilities lessens energy wasted on the problem.
- 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.

Possibilities are more exciting than problems, and more effective, too. There are more than two possibilities in most situations. The more possibilities your board can think of, the better its chances of finding one that is acceptable.

Action planning is a way to manage conflict. The important thing is not whether you have conflict, because you will, but how you deal with it.

EVALUATING YOUR BOARD

You and your board can profit from examining how well it is fulfilling its role. If the only review occurs when board members run for re-election or seek reappointment, you have no process for improving the effectiveness of your board. Evaluation is an effective tool for you to use to examine how well the board is functioning. Evaluation should be the system by which your board agrees on what it is to do and then decides how well it did. Various forms of evaluation are available, and the board also could hire a facilitator to assist it with its evaluation. Each board should choose the evaluation format that best fits its situation. AASB offers several resources to assist school boards with this annual review.

Principal steps and elements of evaluation every board can take are:

- Establish the process the board will use;
- Devise or select an instrument;
- Conduct a work session scheduled exclusively for the evaluation;
- Use the format agreed upon;
- Schedule at least one evaluation yearly; and
- Use the results.

Time must be deliberately set aside for board self-evaluation, and the president must ensure that it is conducted. Otherwise, there will never be time enough for it, and other things will seem more important.

SCHOOL BOARD MEMBER DEVELOPMENT

A matter of continuing concern for you and your members is knowledge and skill in governing – how to get it and keep it current. Since little pre-membership training exists for board members, in-service education is the method for gaining that knowledge and skill.

Educational activities should come from identification of special needs by the board and individual members and identification of broader needs by state and national school boards associations.

When the board identifies needs locally, the next step is a search for practical training. There are a variety of options. You could arrange for a local

in-service program or an entire retreat for your board with an education consultant or other noted expert. Dozens of workshops and conferences on education issues are conducted annually specifically for school board members by AASB, the National School Boards Association and other education groups. (*See sidebar*) Your superintendent is an excellent source of information on these programs. You also may appoint a member of the board as educational liaison to inform the board about available training activities. The value of knowledgeable board members certainly is worth the time required to plan and participate in in-service education. A board policy supported by budgeted funds is the backing needed for you and your superintendent to keep your board members up to date. Your greatest contribution to your board is your effective use of the knowledge among your members to satisfy their expectations and advance the work of the board.

A SCHOOL FOR SCHOOL BOARD MEMBERS

AASB's School Board Member Academy each year sponsors a wide array of workshops on education issues and topics related to school system governance. In essence, the Academy is a school for school board members, providing education leaders with opportunities to develop the skills and resources they need to do their jobs better.

The Academy is built on the eight key areas of school board focus:

- School board members' roles and responsibilities
- Policy and planning
- Financial accountability
- Creating the optimal learning environment
- Academic achievement
- Staff development
- School board meetings and school law
- Community engagement

Two core curriculum conferences are offered annually in addition to board orientation workshops and other special programs. Academy participants receive credits for attending these conferences and eventually can reach one of the Academy's four achievement levels. Each achievement level represents a degree of expertise in education governance.

Those who have completed all four achievement levels may annually earn the distinction Master School Board Member by continuing their training.

4: WORKING WITH YOUR SUPERINTENDENT

Just as you need cooperation among the members of your board in the important task of making policies and plans, you also need the cooperation of your superintendent and other key administrators. Policy-making is the responsibility of the board, and administration is the responsibility of the superintendent and staff. Yet policies are only as good as the manner in which they are carried out. Proper policy use results when the superintendent and administrative team are encouraged to provide information and comments to the board and staff during policy formulation. Thus, they know the board's intent, they are committed to something they helped to shape, and they see to it that daily actions agree with the policy intent.

During your presidency, you will find the superintendent and staff to be reliable and essential resources. Your professional staff possesses skills and experience in handling school affairs. When included in a sincere, cooperative team effort, they can become the board's strongest link with the daily education of students and operation of the schools. They are equipped to handle the day-to-day administrative details of your school system, while you and the board tackle the essential tasks of planning and policy-making.

Your superintendent shares certain responsibilities with you, for example:

- Serving as spokesperson for the board;
- Representing it before many publics;
- Communicating information;
- Soliciting community support for the school system;
- Helping develop policies and programs through recommendations to the board; and
- Motivating the board.

DEVELOPING COMMUNICATION SKILLS

The superintendent is your partner in the school system's leadership. The administrative team is your board's partner in managing the schools. Use them both to the best advantage of your school system. A public commitment to building and maintaining a successful board/administrative relationship is the first step. Because there are so many ways you and your board's administrative team work together, it is essential that you approach each other with trust, candor and respect. It is important to discuss and

agree openly and honestly from the outset on your respective roles and responsibilities and the school system's goals and objectives. You and your superintendent are the leaders who hold yourselves, your board and your staff to this commitment. Communication – continuous, frequent and open – is the single most important factor to help you work successfully with the superintendent. Experts – the practicing boards and superintendents from all regions of our country – testify repeatedly to this. If you and your superintendent do not lead in communicating, it will not be done well. Your responsibility to communicate includes these actions.

- Talk with your superintendent frequently to give and receive information about board and school operations.
- Encourage your superintendent to keep the board up to date on all school matters, including problems.
- Help your superintendent keep the board well enough informed 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 and school affairs.
- Ask board members to use board policy for handling complaints so they are referred to the superintendent or to the person immediately responsible for solving the problem.
- Lead board members to observe board policy for making changes rather than pressing the superintendent to do so.
- See that the superintendent provides board members with sufficient information in advance of meetings to assure good decisions.
- Schedule ample time in meetings for discussing important matters such as the board's performance, the superintendent's performance and the relationship of the board and superintendent.
- Include your superintendent at the table in every meeting of the board, including discussion of the evaluation of the superintendent's performance.
- 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.

BOARD/SUPERINTENDENT RELATIONS

A top priority for you and your superintendent is to recognize just how important the board/superintendent relationship is and to make it a priority.

Your board cannot be effective without an effective superintendent, and your superintendent cannot be effective without a good working relationship with the board. If your relations are not all you and/or the board think they should be, get the board and superintendent together immediately and talk about it. A division of functions between the board and superintendent is essential. Your board and your superintendent must take the time to discuss and agree on the role of the superintendent and the role of the board. These agreements should include job descriptions for the board and superintendent, policies and administrative regulations, goals of the board, and objectives of the administration and be established as board policy for all to know and abide. The evaluations of the board and superintendent are based on these agreements.

Your responsibility as president is to help your board understand and make this important relationship successful. Your encouragement and support will make it possible for your superintendent to give responsibilities to other administrators in order to have sufficient time to concentrate on developing good interpersonal relation skills, getting to know each board member, planning good board meetings, communicating directly with every board member frequently, and providing the board with the resources it needs to make good decisions.

YOUR SUPERINTENDENT'S ROLE IN MEETINGS

The productivity of your board meetings also involves your superintendent's contributions. The role of the superintendent in meetings should be agreed upon by the board and the superintendent. The superintendent will work with you in planning and conducting meetings. A few common practices are that your superintendent:

- Attends all meetings and executive sessions;
- Plans with the president agendas and meeting operations;
- Directs comments to all members, rather than individuals;
- Does not show an adverse attitude when in disagreement with the board or individual members;
- Accepts constructive suggestions for the operation of the schools;
- Explains recommendations energetically and aggressively;
- Recognizes value differences among members as normal and valuable;
- Takes a stand, when necessary, on controversial issues;
- Submits personal recommendations on items before meetings;

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- Respects the decisions made by the board and supports them;
 - Provides alternatives with supporting information to aid decisions; and
 - Demonstrates a courteous, cordial and businesslike manner throughout each meeting.

Your encouragement in planning with the superintendent the respective roles each of you is to play in meetings will contribute to making your meetings run smoothly. Your public images will be enhanced.

EVALUATING YOUR SUPERINTENDENT

Your superintendent must reflect the standards, views and values of your school board and your community – the people being served. Your board was selected to do this, too. Your job as president is to help the board focus attention on community expectations, to convey them to your superintendent, and to help your superintendent administer the schools with regard to them.

Evaluation of your superintendent is the way all of these considerations can be put into action through a planned set of activities throughout the year. In fact, regular evaluation is required by the state Board of Education. Superintendents have the option of using the state program or one which has been approved by the state Department of Education. Ideally, the board's evaluation plan and that required by the state should be coordinated closely if the same instrument is not used. Most working evaluation systems contain the following parts:

- Board policy to establish and guide evaluation;
- Board policies on all major operations of the system;
- Goals for the system;
- Contract for superintendent, stipulating performance and evaluation responsibilities;
- Objectives for the superintendent to achieve board goals;
- Job description for the superintendent;
- Performance criteria to give standards and expectations; and
- Evaluation procedures.

Your board should use the kind of evaluation that works for each board member and its superintendent. This means that it may need to be altered with each new board. A good board/superintendent evaluation, supported by the board and superintendent, will contribute to the overall success of your board and school system.

5: WORKING WITH YOUR COMMUNITY

Team effort and cooperation are hallmarks of successful boards. Your job as board president includes bringing together the members of your board with the resources at your disposal. You have many opportunities to work closely with leaders of your community. The relationships developed with these people will provide a rich store of resources to be drawn on to serve your board to the fullest.

COMMUNICATION IS THE KEY

Citizens of your community are valuable resources. You fulfill a responsibility to them by seeking out their ideas, listening to their opinions, using their talents, keeping them well-informed and showing them results. Citizens, in turn, provide the board with much needed information for planning the system's goals. They serve as good indicators of major issues facing the system and public education as a whole. To use community resources to the fullest, you must provide a climate which encourages interest, enthusiasm and participation. The board's actions can convince the public its problems are understood, its input is valued and that solutions will be offered. Communication and involvement are the best ways to do this. Listed here are a few steps boards can take to promote this relationship with the community.

- Make certain your public is kept up to date about board and school activities and achievements.
- Continuously ask for citizens' opinions before making decisions which will affect them directly.
- Inform the different publics that you have heard what they have to say and how you have used it.
- Lead the board to make plans for communication and involvement; don't leave it to chance.

Board meetings are an influential and abundant way to inform and involve the community. Conducted in the proper manner, meetings will give a positive image of the school board and school system; citizen comments will be received, reasons will be provided for decisions, board and school activities and achievements will be publicized, and information from concerned groups will be sought. The meetings provide the news media with an open forum for positive news presentations.

MANAGING FORMAL COMMUNICATION

Productive communication networks use both formal and informal practices. Formal practices are intentionally planned and conducted by the board. Some examples are listed here.

- Survey questionnaires developed by the board to seek information about specific topics.
- Special meetings of the board conducted solely to seek citizen response to key issues.
- Committees and task forces appointed by the board to provide alternatives to the board.
- Board liaisons to key community groups or bodies, such as the city council, chamber of commerce and PTA council.
- Regular newsletters reporting the school system's goals and achievements.
- Focus groups to get community feedback on the progress of the school system.

Responses from these activities are collected, tallied, summarized, reported publicly and used by the board in future considerations of the topics.

Many boards consider communicating with their publics important enough to employ a part- or full-time public information person to coordinate and maximize news communication efforts. Board policy and procedures should govern what and how information is to be collected, written and distributed – all with the primary concern of keeping the public up to date on its schools.

ENCOURAGING INFORMAL COMMUNICATION

Informal communication occurs by occasion rather than scheduling, but the input can be equally as useful. Examples of informal communication are:

- Incoming board correspondence;
- Board communications; and
- Informal conversations with citizens.

Conversations between board members and citizens are the most frequent sources for receiving valuable community input. Although informal and unscheduled, these chance encounters should be governed by certain

guidelines agreed upon by the board. During these informal communications, board members should:

- Regularly remind citizens that they listen as individual members but will carry messages to the superintendent and board for action;
- Make it clear when they express personal opinions;
- Support actions of the board and urge citizens to help the board work together for the common interest of the school system and community;
- Hear concerns and refer them to the proper source for assistance; and
- Refuse to discuss confidential matters.

Planned communication activities of the board have impact, but few are more influential than the manner in which you conduct yourself as president of the board of education. You set the model for others to follow. Your primary role is to represent the interests, values and needs of the people of the school system. You carry out this role only if you maintain close contact with the community and if you lead the board and superintendent to represent community expectations.

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ALABAMA ASSOCIATION OF SCHOOL BOARDS

The Alabama Association of School Boards is the official voice of the state's local school boards and other boards governing K-12 education agencies. AASB is dedicated to improving educational opportunities for all Alabama public school students through the improvement of local lay management of public schools. By pooling resources through its membership, AASB provides a wide range of services to local school boards which one school board could not provide economically.

Services available include:

- Boardmanship training and development;
- Risk management programs;
- Policy analysis and update; and
- Legal assistance.

AASB also represents school boards before state government, promoting local lay control of public education. Alabama's school board interests, too, are represented on the national scene through AASB's participation in the National School Boards Association. Information on successful programs, innovative management techniques and the latest government action is available through several AASB publications regularly sent to members.

AASB is continually striving to provide members with the resources and services they need to be effective education leaders.

For more information on AASB and its services, please contact AASB at 334/277-9700; or P.O. Drawer 230488, Montgomery, AL 36123-0488; or visit www.alabamaschoolboards.org online.

