



# Board Training

Presented by Rhonda Crass



LEASOR CRASS, P.C.  
YOUR SCHOOL • OUR MISSION



# Board Roles and Responsibilities



# Essential Functions

- **Hire Superintendent:**
  - A highly -qualified superintendent will produce excellent leadership and discretion that will allow the District to function efficiently.
- **Set Board Policies & Procedures:**
  - Having sound policies and procedures will allow all students, parents, employees and the public to know and understand how the District will operate on a daily basis.
- **Set the Tax Rate:**
  - This is an essential function of the Board and should be done only after consultation with your Superintendent and business manager and/or CFO.



# Signs of an Effective School Board Member

The following are signs of a school board member focused on moving the school district forward and educating all students to meet high standards:

- *Great school board members have a clear vision for the district.* They set the vision and goals, and measure the success of the district and superintendent against the goals.
- *Great school board members communicate their actions to the community.* Through public discourse and written reports, great school board members keep the public informed of the district's progress and challenges.



## Signs of an Effective School Board Member

- *Great school board members work as a team.* They collaborate well with others and are respectful of the other board members and superintendent.
- *Great school board members adopt a fiscally sound district budget.* They pay attention to finances and regularly monitor the fiscal health of the district.



# Signs of an Effective School Board Member

- *Great school board members focus on what is best for all students.* They focus on student achievement and implementing policies that will ensure success for all students.
- *Great school board members advocate at the local, state and national level for public education.* They take advantage of opportunities to communicate the needs of public schools to other levels of government and advocate for strong public schools.



# Signs of an Ineffective School Board Member

If you notice any of the following signs, it's time to find some new candidates to run for your local board:

- The school board member continually focuses on one issue or talks aimlessly at meetings.
- The school board member doesn't conduct him or herself in a respectful, collaborative manner in public.
- The school board member comes to meetings unprepared.



# Signs of an Ineffective School Board Member

- The school board member “rubber stamps” all the superintendent’s proposals without asking hard questions.
- The school board member micromanages rather than focusing attention on district-wide policies.
- The school board member uses his position on the school board as an opportunity to put forth a political agenda with little relevance to student achievement.



# Board Effectiveness Goals

- Agreeing to respect the majority after a vote
- Agreeing to be respectful of all members opinions
- Agreeing to work toward the goals of the Board as a whole
- Agreeing to make decisions based on information and data
- Agreeing to keep confidential matters as required by law
- Agreeing not to participate in a “Walking Quorum”
- Agreeing on a note taking policy



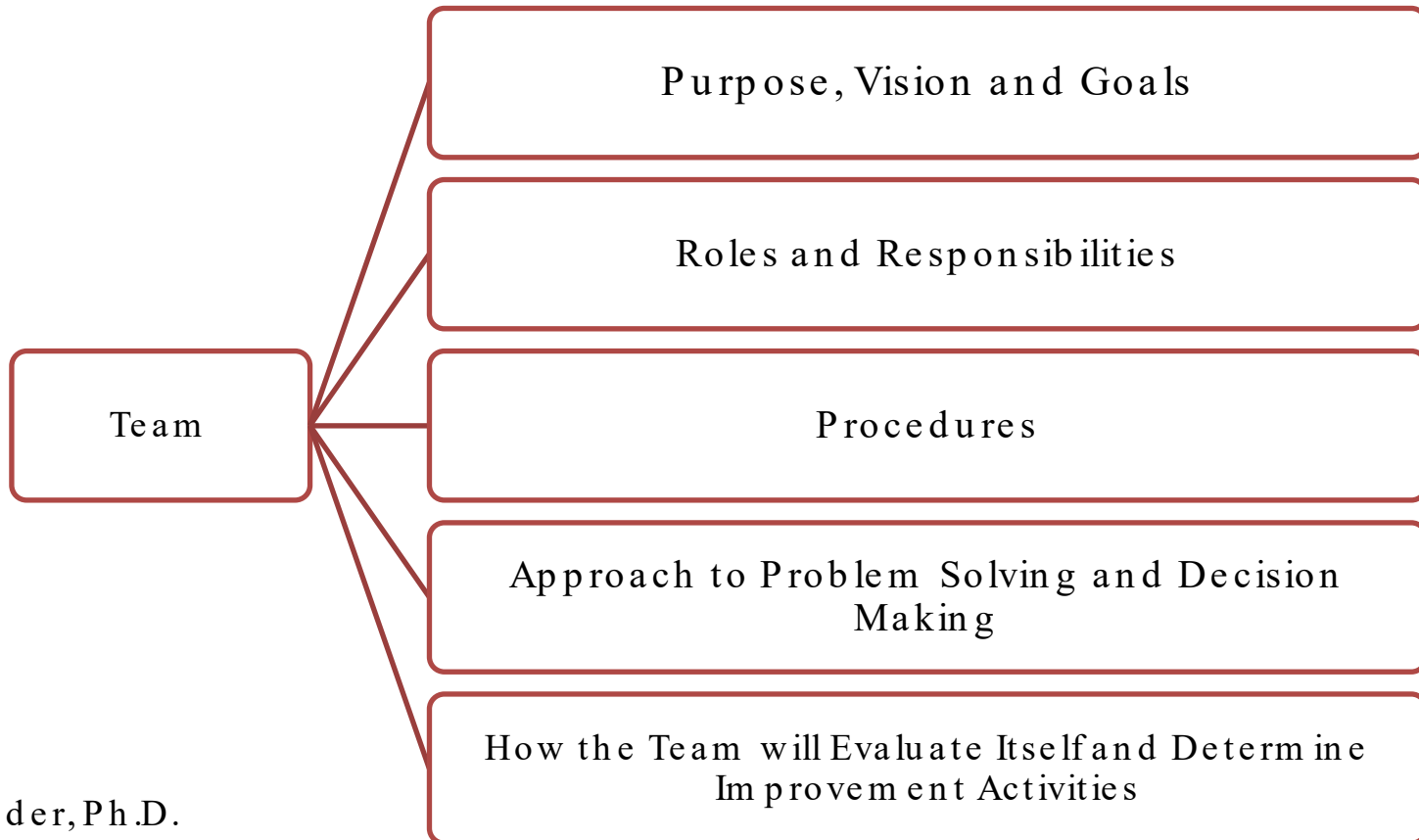
# 7 Signs of Effective School Board Members

1. Going solo's a no-go
2. Respect the team
3. Understand the difference between board and staff
4. Share and defend your views, but listen to the views of others
5. Do your homework and ask tough questions
6. Respect your oath
7. Keep learning



# CHARACTERISTICS OF EFFECTIVE TEAMS

Shared understanding & agreement on:





# MORE CHARACTERISTICS OF EFFECTIVE TEAMS

An environment that supports:

Open Communication

Full Participation of All Members

Ability to Manage Conflict Through Dialogue

Development of Mutual Trust, Respect, and Understanding

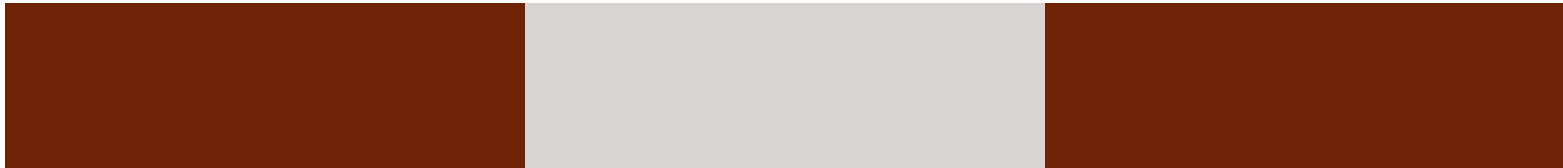


# OPEN COMMUNICATION, TRUST, RESPECT, AND UNDERSTANDING?

- ✗ 1. Team members get quiet when they disagree.
- ✓ 2. Board president quiets others when one is speaking to the rest of the team
- ✓ 3. Information is shared with new board members immediately upon election
- ✓ 4. The board shares its expectations with the superintendent and considers her/his ideas



# COMMUNICATIONS BETWEEN BOARD AND SUPERINTENDENT



**EXAMPLE**

## **X. COMMUNICATIONS WITH SUPERINTENDENT**

- A.** Superintendent will meet with the Board President on a routine basis.
- B.** Superintendent will communicate with all Board members via regular transmittals by telephone calls, faxes, e-mail, text messages or personal visits.
- C.** Superintendent and Board President will communicate information in a timely manner to all Board members.
- D.** Board will keep Superintendent informed via telephone calls, faxes, e-mail, text messages or personal visits.



# MEDIA COMMUNICATIONS AS AN INDIVIDUAL



*A Trustee retains the right to speak to the media as an individual but must understand any comment will likely be interpreted by viewers/readers as an official statement of the Board.*

In speaking as an individual, the Trustee should:

- Clarify they are speaking as an individual and not for the Board.
- Remind the media representative(s) that official statements of the Board are made only by the Board President (or his/her designee).
- Remind the media representative(s) of the position or action of the Board related to the issue in question.
- Notify the District's Superintendent or designee about the media request prior to statements.



# BOARD OPERATING GUIDELINES



# Operating Procedures

Board Operating Guidelines and  
Board Operating Procedures are the  
same thing.



# Operating Procedures

The Board Operating Guidelines address issues not covered in policy and are basically an agreement among board members as to how you plan to operate.



# Operating Procedures

Board Operating Guidelines should be reviewed and updated every year following the election.



# Operating Procedures

- Seating new board members
- Placing items on the agenda
  - Access to information
- Spokesperson for the Board
  - Selection of Officers



# Visiting Campuses

1. Always a board member.
2. Do not go into classroom.
3. Make an appointment with principal.
4. Notify the Superintendent.



# Operating Procedures

- Select a committee to revise current ones for the Board.
  - Review and adopt.
- Review annually each year following the board elections.



# Operating Procedures

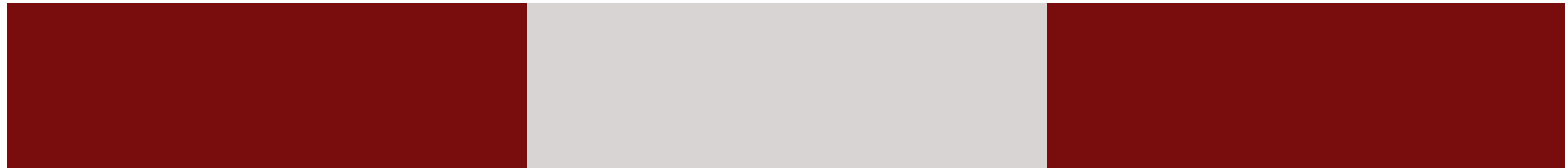
- Can restate things that are already in policy for transparency.
- Can be very detailed and many pages or short and few pages.
- Look at other districts and craft what works for your board.



# BOARD SELF- EVALUATION



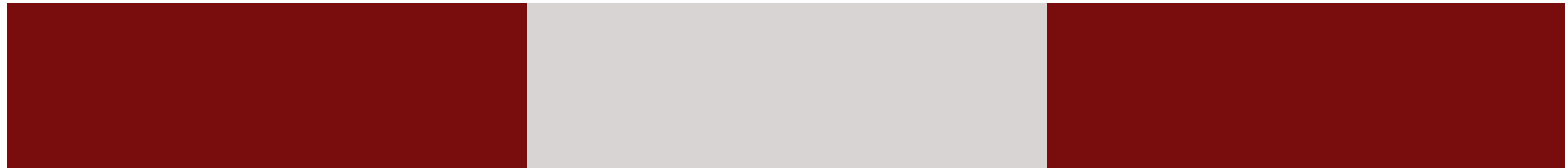
# Elected Board



1. The self-governance piece can be difficult with the potential of board members changing frequently especially in these day and times.
2. True self-governance begins with the leadership position of the board president.
3. This becomes difficult depending on the social, cultural and political makeup of the board.



# TEAMWORK

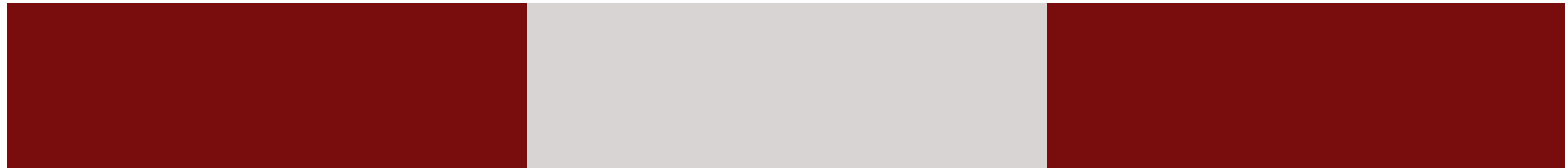


The board's duties are distinct, and the board works effectively as a collaborative unit and as a team with the superintendent to lead the district in fulfilling the vision and goals.

- Recognizes its distinct role in establishing the vision and the goals, adopting policies that guide the district, setting priorities, establishing governance protocols to oversee management of the district, adopting and overseeing the annual budget, and hiring and evaluating the superintendent
- Recognizes each individual trustee's duty as a trustee and fiduciary for the entire district



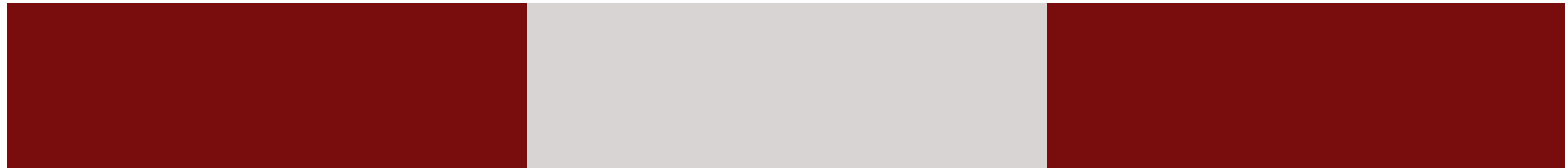
# TEAMWORK



- Remains focused on its goals and priorities, as opposed to individual agendas separate and apart from the shared vision
- Annually evaluates its performance as a team, with attention given to the district's vision and goals; fulfilling the board's duties, responsibilities, and commitments; and the board's working relationship with the superintendent
- Makes decisions as a whole only at properly called meetings and recognizes that individual members have no authority to take individual action in policy or district and campus administrative matters



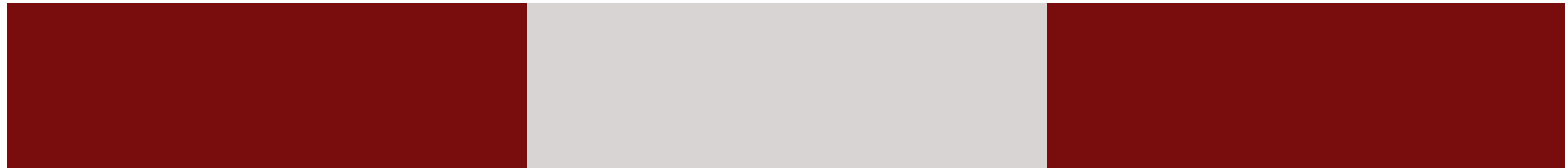
# TEAMWORK



- Respects the right of individual members to express their viewpoints and vote their convictions and honors the decisions of the majority
- Develops teamwork, problem -solving, and decision -making skills as a team with its superintendent
- Understands and adheres to laws and local policies and respects the superintendent's responsibility to manage the school district and to direct employees in district and campus matters
- Adopts and adheres to established policies and procedures for welcoming and addressing ideas and concerns from students, families, staff, and the community



# TEAMWORK



- Establishes and follows local policies, procedures, and ethical standards governing the conduct and operations of the board
- Understands the leadership role of the board president and adheres to local policies and procedures about the duties and responsibilities of the board officers



Why We Need  
Local School  
Boards and Control





# The Role

Our system of local school districts and boards of education epitomizes representative and participatory government — citizens elected from their community making decisions about educational programs based on community needs, values, and expectations. School boards are entrusted by the public to translate the needs of students into policies, plans, and goals that will be supported by the community.



# Elections

School district trustees are elected by popular vote. Whether an election is by majority or plurality vote is a matter of local policy.

Traditionally, trustees serve either three - or four -year terms, and most trustees serve staggered terms to support board continuity.





# Types of Elections

- Plurality – The top vote getters in the election win the seat.
- Places – You must sign up for a specific place and run against those in that place . The top vote getter in the election wins the place . You do not need to get at least 50% of the vote to win .
- Single member Districts – you must live within the boundaries of the district to run . You must win by at least 50% of the vote to be elected or the top two candidates have a run-off election ..



# Roles

- The school board governs the district, but it does so with the advice of the superintendent.
- The superintendent manages the district, but they must do so with the oversight of the board, and within the framework of policies and priorities the board adopts or takes action upon are items that are properly posted in accordance with the Texas Open Meetings Act.



# Team of 8

- The purpose of the team - building session is to enhance the effectiveness of the board/superintendent team and to assess the continuing education needs of the board -superintendent team.
- Training can provide good training ground for self - governance and what board members can and can't do in their roles.



# Self- Assessment

School Board Self-Assessment marks your first step toward growth . Each board member's input uncovers strengths and growth areas needed .

Self-assessment also provides an avenue for an open discussion on self-governance .



# FAILURE TO SELF- GOVERN





# TEA INTERVENTION

The commissioner of education has the authority to appoint a monitor, conservator, management team, or board of managers to oversee low-performing districts under the Texas Education Code .

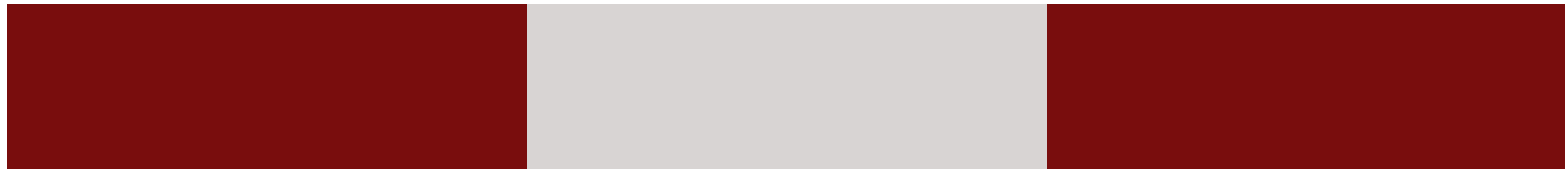


# TEA APPOINTMENTS

- Monitors report to the Texas Education Agency (TEA) on the activities of the board of trustees or the superintendent.
- Conservators oversee the operations of the district.
- A management team directs the operations of a district in areas of insufficient performance.
- A board of managers exercise the powers and duties of the board of trustees.



# AP P O I N T M E N T S



The education commissioner may appoint a monitor or conservator if a school district or charter school fails to satisfy accreditation criteria, academic performance standards, or financial accountability standards, or on the basis of a special investigation .



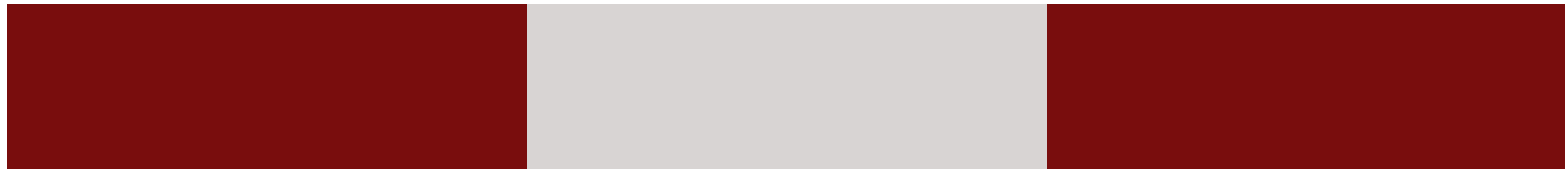
# THE ROLE OF A MONITOR OR CONSERVATOR



**Monitors and Conservators support, coach and recommend/direct actions of a school district to improve the area of deficiency in which they were appointed . The job of a monitor or conservator is to oversee the school district in correcting any identified deficiencies and ensure sustainable systems are developed and operating for future success .**



# THE TIMELINE



Monitor placements occur largely based on directed or agreed corrective action plans. The monitor placement continues until all corrective actions have been completed and evidence of sustainable has been collected.

Conservator placements are reviewed at least every 90 days to ensure the placement is necessary for effective governance of the school district or delivery of instructional services.





# COMMON SOURCES OF CONFLICT



1. **Resource Allocation :** Limited resources can lead to disputes over funding priorities and resource distribution .
2. **Interpersonal Relationships :** Conflicts may arise from the diverse interpersonal relationships within the school community .
3. **Communication Breakdowns :** Poor communication can result in misunderstandings and lack of clarity in roles and expectations .
4. **Differences in Perception :** Varied perceptions and opinions among stakeholders can lead to disagreements .
5. **Management Styles:** The management style of school leaders can sometimes clash with the expectations of staff and teachers .
6. **External Pressures:** Changes in legislation, societal expectations, and educational trends can create tension within the governance structure .



# BEST PRACTICES



# EFFECTIVE SELF- GOVERNANCE PRACTICES



1. **Setting Clear Vision and Goals:** Establishing a strategic vision for the district and setting measurable goals to guide decision -making .
2. **Developing Robust Policies :** Crafting policies that provide clear guidance while allowing flexibility for the superintendent and staff to innovate within set parameters 1.
3. **Allocating Resources Wisely :** Ensuring resources are allocated in alignment with the district's priorities and goals .



# EFFECTIVE SELF- GOVERNANCE PRACTICES



4. **Assuring Accountability** : Implementing systems to monitor and evaluate progress towards goals, including the performance of the superintendent .
5. **Engaging in Continuous Learning** : Committing to ongoing professional development to stay informed on best practices and emerging issues in education governance .



# EFFECTIVE SELF- GOVERNANCE PRACTICES




6. Building Community Relationships :  
Maintaining open communication and positive  
relationships with the community, staff, and students .
7. Practicing Ethical Leadership : Demonstrating  
integrity, transparency, and ethical behavior in all  
board activities



COMMUNICATION  
AND PUBLIC  
COMMENTS





# Individual Authority for Committing the Board

- **Board members as individuals shall not exercise authority over the District, its property, or its employees. Except for appropriate duties and functions of the Board President, an individual member may act on behalf of the Board only with the express authorization of the Board. Without such authorization, no individual member may commit the Board on any issue. [See BDAA]**



# Referring Complaints

- If employees, parents, students, or other members of the public bring concerns or complaints to an individual Board member, he or she shall refer them to the Superintendent or another appropriate administrator, who shall proceed according to the applicable complaint policy. [See (LOCAL) policies at DGBA, FNG, and GF]



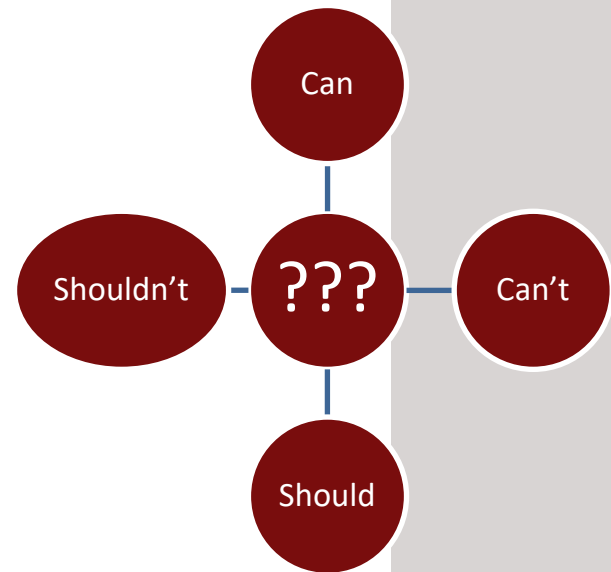
A BOARD  
MEMBER...



The answer  
is ...

**Handle complaints given  
to them about individual  
teachers or staff members.**

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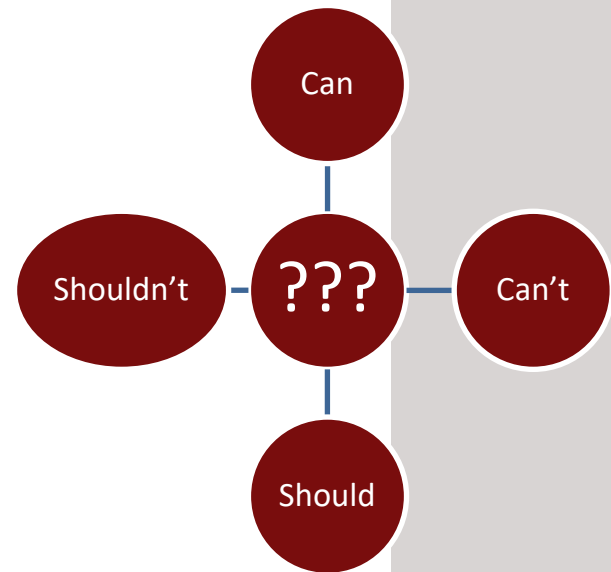




02

The answer  
is ...

**Address actions of other  
board members who are  
acting outside of their  
scope as a board member.**

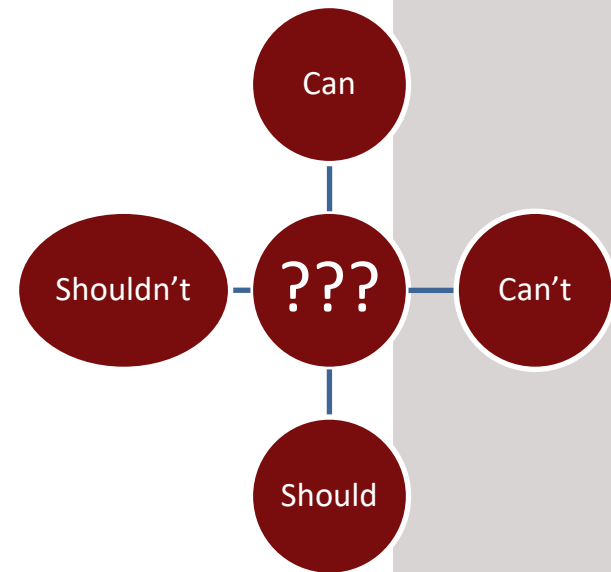




03

The answer  
is ...

**Participate in social media  
as it pertains to school  
business.**

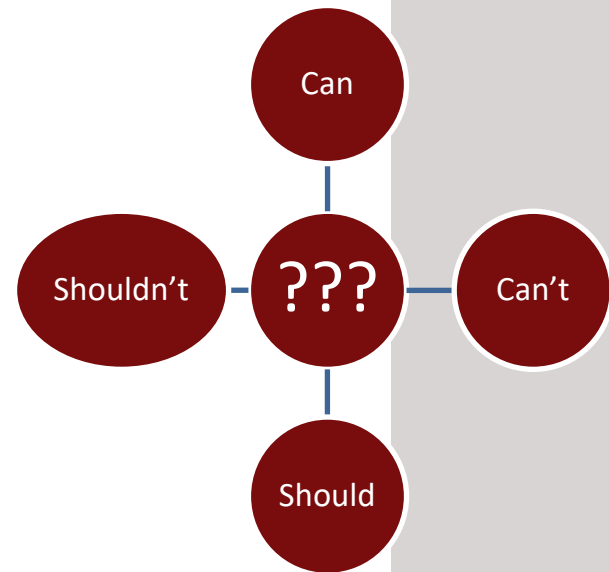




04

The answer  
is ...

**Tell the superintendent  
who needs to be hired  
and fired.**

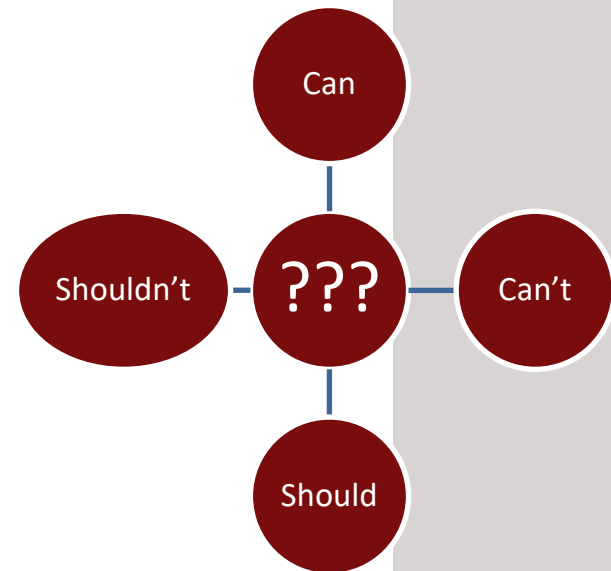




05

The answer  
is ...

**Participate in interviews  
for key positions such as  
assistant superintendent,  
principal, or athletic  
director.**

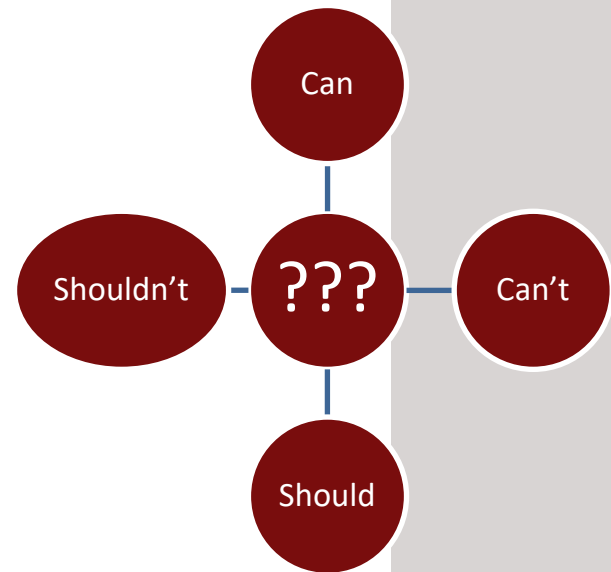




06

The answer  
is ...

**Discuss district business  
with your spouse that was  
discussed in closed  
session.**

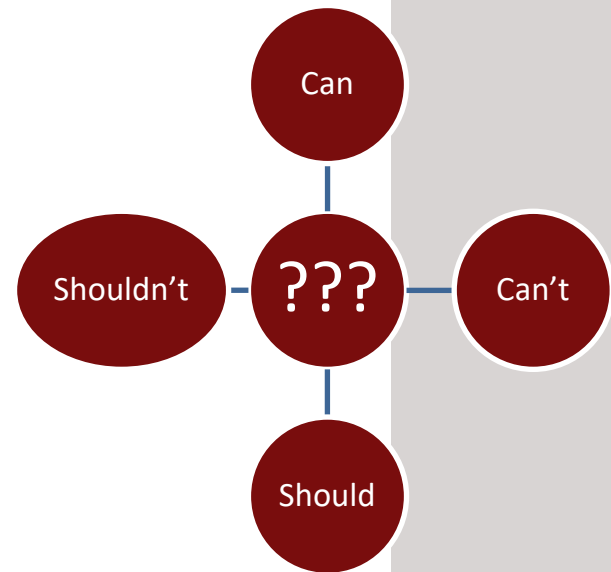




07

The answer  
is ...

**Respond to questions  
from the public about  
board decisions made in  
open session.**

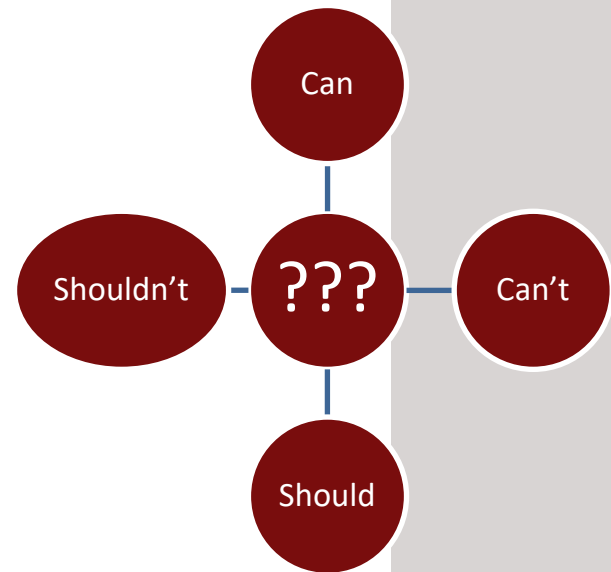




08

The answer  
is ...

**Respond to questions  
from the public about  
Superintendent decisions.**

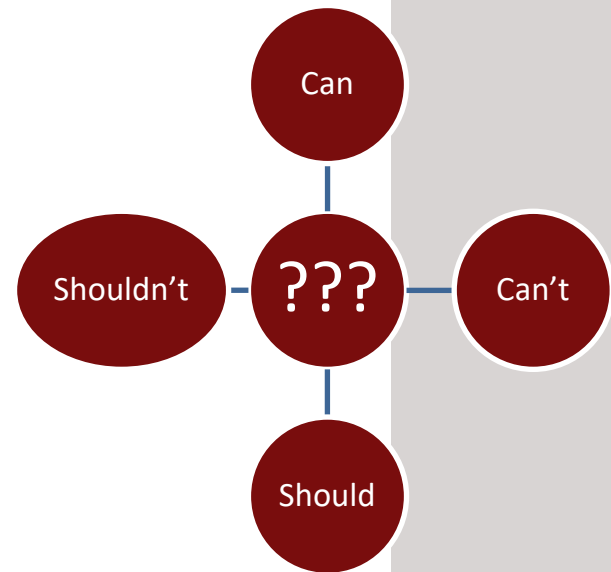




09

The answer  
is ...

**Tell District employees  
how to disperse Booster  
Club donations.**

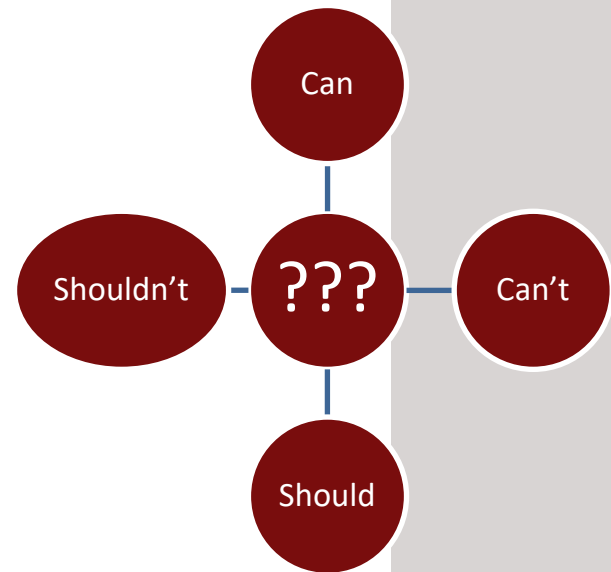




The answer  
is ...

**Make every effort to  
attend board meetings to  
participate as an active  
board member.**

10







# Search Process





# Timeline

**The board must first establish its timeline for securing a superintendent.**

- **This will differ from district to district.**
- **The timeline should be adhered to so that potential candidates are able to better manage their expectations.**





# Timeline

**The board must first establish its timeline for securing a superintendent.**

- **The schedule allows the community and staff to understand what the board expectations are for succession in leadership.**
- **The board can move as fast or slow as it chooses.**





# Opportunities for Engagement

- **Community Focus Group**
  - **A representative sample of business leaders, clergy, parents, students, staff, and city and chamber of commerce directors**
- **Survey for staff, community, and parents**
- **Survey for individual board members**





# Opportunities for Engagement

## District Meetings

- Cabinet Level
- Executive Directors
- Principals
- District Wide Staff Meeting
- PTO Officers
- Long Range Facilities/Planning Committee





# Developing a Profile

- Allows potential candidates to know what the board seeks with possible input from the community through a survey and/or focus group meetings.
- Keeps the board focused on what they are specifically looking for in a candidate which makes the decision more data driven than emotionally driven.
- Provides information about what makes your district great.





# Applications

- Different firms do different applications.
- What is the board looking for in its next Superintendent?





# Agenda

Should be provided to your district for each meeting the required agenda postings to ensure that your agendas meet the legal requirements of the Texas Open Meetings Act.





# Contact with Applicants

Should schedule all interviews with the applicants to avoid any implication of preferential treatment by the board .

Should notify all those promptly who are not selected for an interview .

Should notify all those promptly who are not selected as the lone finalist .



# APPLICANTS

- Only Board Members are allowed to know the name of the actual applicants for the position of Superintendent at Bastrop ISD.
- Revealing the name of any applicant is a violation of the Texas Public Information Act.



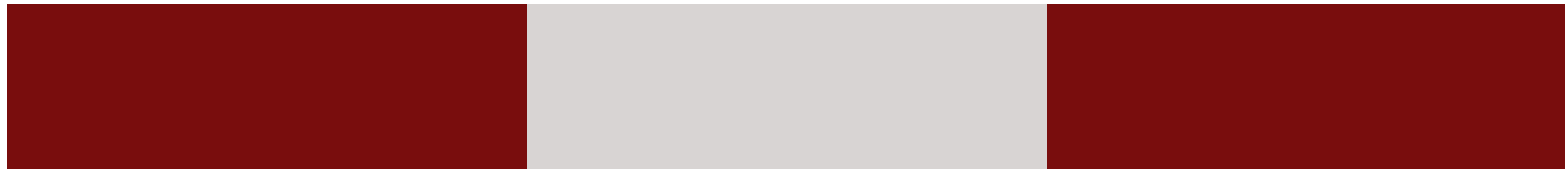


# CONFIDENTIAL SEARCH

- Encourages applicants to apply as it will not affect their current position in their current community.
- It is not a good idea for an applicant to have a community member reach out to members of the Board.
- If you know someone who has applied and want to give them a good recommendation, contact consultant directly with the information.
- Conversely, if you know someone who has applied and you don't believe they are a good fit, contact consultant.



# NAMING A LONE FINALIST



- At the meeting where the Board names the lone finalist, the Board will make known to the public who the expected choice is for the position. They may not hire the superintendent until at least 21 days after the Board has named a lone finalist.
- After the Board selects its lone finalist, the name of that individual must be posted for 21 days.
- During the 21 -day period, the Board will negotiate the contract with the new superintendent.



Questions?



# CONTACT INFORMATION

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