



Leadership for **STATE SCHOOL BOARDS ASSOCIATIONS**

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This handbook is custom-designed for state school boards association executive directors and their elected leaders to use as a collaborative tool to strengthen both the leadership and the value of their state associations. It is a must-read for all who serve at the leadership level in state school boards associations.

NSBA appreciates the leadership of authors Robert Rader, executive director of the Connecticut Association of Boards of Education; Jeannie “Sis” Henry, executive director of the Georgia School Boards Association; and Susan Francis, executive director of the Delaware School Boards Association.

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The guidebook may be downloaded from the Members Only section of the NSBA website. Print copies are available at no charge to NSBA members.

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CONTENTS

INTRODUCTION: THE PURPOSE OF THIS GUIDE	1
PART I: THE WORK AND FUNCTIONS OF AN ASSOCIATION	3
Governance	
The Work of the Board of Directors	
Fiduciary Responsibilities	
The Role of the Executive Director	
• The Executive Director’s Job Description and Evaluation	
• The Executive Director’s Contract	
The Business Side of the Association	
Building Leadership on the Board of Directors	
PART II: SCHOOL BOARDS ASSOCIATION WORK AND LOCAL SCHOOL BOARD WORK	14
Basic Similarities and Differences	
Focusing the Agenda on Strengthening Local Boards	
Reinforcing the Role of Local Boards	
Delegate Assemblies	
Interaction and Involvement with Staff	
Association and Local Policy Issues	
Legislative Efforts	
Association Business vs. School District Business	

PART III: ASSOCIATION LEADERSHIP	23
Setting the Vision	
The Board's Commitment and Buy-in	
Dealing with Board Dynamics	
Orientation for New Association Board Members	
Retreats for the Board of Directors and Senior Staff	
A Possible Self-Assessment for the Board	
Planning the Agenda for Board Meetings	
A Quick Checklist for the Board Meeting	
PART IV: CONCLUSION	32
PART V: BIBLIOGRAPHY	33

INTRODUCTION: THE PURPOSE OF THIS GUIDE

All school board members are considered leaders by virtue of their election or appointment. Being selected to serve on a school board provides them with critical opportunities to become educational leaders. Those who serve on the boards of state school boards associations, however, are really the “leaders of leaders.” To do this work effectively and to carry out their statewide responsibilities, they must understand how school boards association work differs from local school board service.

Over the last few years, many books have been written about leadership. It seems everyone who has ever held a position of power in politics, a great economic institution, or the military has written about how to lead others, whether in government, business, or war.

In *Leading Leaders: How to Manage Smart, Talented, Rich, and Powerful People*, Jeswald W. Salacuse uses examples from all three areas but goes beyond the usual discussion of how to lead. Salacuse, a professor of law at the Fletcher School of Law and Diplomacy at Tufts University, focuses on how to lead *leaders*—highly educated experts, investors, government officials, doctors, or lawyers.

How does one guide these smart, talented, rich, and powerful people when the leader has little authority over them? How does one guide leaders who have options outside the organization and thus have a strong sense of independence from both the organization and its leader—and when the supposed followers have their own followers and constituents? These are exactly the same issues facing the leadership of state school boards associations, even though the members may not exactly fit into the “talented, rich, and powerful” category.

Members of the boards of directors of state school boards associations come from nearly every walk of life. Some may be doctors or lawyers, some may be rich or powerful, but others may not. What they all have in common is that they also serve as local school board members. This is the tie that binds them as members of their state school boards association board of directors.

To lead leaders, Salacuse says, the leader (in our case, the state association board of directors) must carry out the “Seven Daily Tasks of Leadership”:

1. **Direction.** How do you negotiate a vision for the organization that other leaders will buy into?
2. **Integration.** How do you make the individual “stars” in your organization into a team?
3. **Mediation.** How do you resolve conflicts over turf and power among other leaders so the organization can move forward?

4. **Education.** How do you educate those who think they are already educated?
5. **Motivation.** How do you move other leaders who already “seem to have everything” to do the right thing for the organization?
6. **Representation.** How do you lead your organization’s outside constituents while still leading leaders inside?
7. **Trust creation.** How do you gain and keep other leaders’ trust?

Again and again, Salacuse comes back to the point that people follow a leader because “they believe it is in their interests to do so.” Interests drive actions. Thus, for the state association board of directors, understanding the concerns and interests of the state’s member school boards is imperative. Leadership is all about building relationships with the members led by the board of directors.

This guide was developed to delineate the differences between the work of local school boards and that of state school boards associations’ boards of directors. It was also developed to help “leaders of leaders” encourage their boards to enhance the mission and vision of the association, to build trust and communication with member districts, and to foster the outreach and development of leadership necessary for the association to maintain the continuity of its work and the trust of its members.

Please view this handbook as a tool to initiate conversations on enhancing the strength and efforts of your state association. We believe this handbook can also be used to help build support for local control of local school systems and to provide resources from other state-level associations for enhancing their work. These resources are not intended as “best practices”; rather, they are samples of what may work in other states. As your state association considers strengthening its work, you might find it valuable to collect multiple samples of similar efforts from other associations.

We wish you the best of luck as your board of directors works to make your association the best it can be.

PART I: THE WORK AND FUNCTIONS OF AN ASSOCIATION

*“Americans of all ages, all stations of life, and all types of disposition are forever forming associations. ... In democratic countries knowledge of how to combine is the mother of all other forms of knowledge; on its progress depends that of all the others.”—Alexis de Tocqueville, *Democracy in America*, 1835*

Associations are not a new phenomenon in America. We have been establishing these mutual-aid organizations for hundreds of years. Associations have always been started to allow groups of individuals or organizations to achieve their common goals more effectively and efficiently while remaining in compliance with applicable laws and regulations.

This handbook is designed to help members of boards of directors of state school boards associations in their role on the board. It describes how serving on a local school board differs from serving on the board of directors of an association. Bear in mind, however, that each state school boards association has some characteristics in common with the others and some that are different. This publication should not be seen as a complete orientation to service on a state school boards association board of directors. It is intended instead as a helpful guide that can be easily expanded upon by your state association staff.

School boards associations have been in existence since the nineteenth century. According to historical research by Thomas A. Shannon, former executive director of the National School Boards Association, the District of Columbia was apparently the first area to have a school boards association, forming the organization in 1800. The first state to follow suit was Pennsylvania, 85 years later. NSBA was established in 1940.

Today, the state school boards associations and NSBA provide a wealth of activities, programs, and services for their members, offering information on virtually everything from advocacy to zero-based budgeting. Among the services provided by state school boards associations are lobbying, legal advice and action, communications, educational programs, employee relations, policy development, insurance, superintendent and administrative searches, management consulting, publications, customized professional development, and research.

Associations are established under the laws of the states in which they are incorporated. States establish their own laws and regulations in this area, but generally the association is required to file articles of incorporation, which are a very general definition of what the association will do. Associations may also be required to file a copy of their bylaws, which set out in more detail how the association will be run. Incorporating is important: Once the association is incorporated, its board of directors and staff are generally protected from personal liability when the association takes action.

Most state school boards associations are nonprofit organizations exempted from federal income tax and state income tax. (Some associations are considered “arms of the state,” but

that is rare.) Forty-five state associations claim federal tax exemption status. Most are designated under section 501(c) (3), (c) (4), or (c) (6) of the federal Internal Revenue Code.

Governance

Most state school boards associations, and NSBA as well, convene a delegate assembly, which generally comes together once a year to set the policies and positions of the association. The delegate assembly also can amend the bylaws of the association, though that generally requires more than a simple majority vote. The delegate assembly is usually made up of one or more voting representatives of the state association's member school boards or, in the case of NSBA, from the board members of state associations.

Generally, the bylaws of a state school boards association will establish the composition of the board of directors. This board's members may be appointed or elected, depending on how these issues are determined in the bylaws. In some states, board members are elected; while in others they are appointed. Usually the elected directors represent various areas within the state and are elected by member boards of education. The appointed directors may be chosen—again, depending on the bylaws—on the basis of the need for representation from various constituencies, such as ensuring urban representation or diversity, or they may be standing committee chairs. The composition of the board of directors will be found in the bylaws of the association, which are created by the delegate assembly. Also designated in the bylaws will be the officer positions, which usually include a president, one or more vice presidents, a treasurer, a secretary, and any other positions the delegate assembly has considered necessary for the association.

It is important to note that the “members” of most state school boards associations are local boards of education, not individual school board members. That is, the entities, not the individuals, are the members. State school boards associations are careful to ensure that any dealings they have with a local board of education—such as providing advice—are meant for the board as a whole, not necessarily for the individual who has asked for the advice. For the same reason, if asked to take action, such as filing a friend-of-the-court brief, the state association will want to make sure that the board as a whole, probably voting either by a majority or by consensus, is asking for the help. Sometimes that is implied when the chair of the board (in some states) or the president of the board (in others) asks for help on behalf of the entire board.

Again, because of sensitivity on this issue and the potential to lose member school boards by taking sides in issues at the local level, state school boards associations are careful to be sure that whatever they are asked to do, that action is to be done on behalf of the board as a whole. Most state associations that offer written opinions or information to an individual board member have policies specifying that the material should be shared with the entire board.

The Work of the Board of Directors

The board of directors of any association serves the critical function of setting the policy of the association within the broader guidelines established by the bylaws. The board also hires the executive director, who, in turn, usually is responsible for hiring, setting compensation for, and—if necessary—terminating staff. The executive director is the chief executive officer of the association and is responsible for the day-to-day operations of the association—again, consistent with the policies set out in the bylaws and by the board of directors.

All state school boards associations are somewhat different, varying in such factors as number of members, size of staff and budget, and geographic and demographic features. Nevertheless, there are some general expectations for the role of each state association's board of directors:

- Establishing a mission statement for the association and providing the vision for the future of the association.
- Establishing operational policies and, if appropriate, recommending proposed bylaw changes.
- Hiring the executive director and approving the executive director's job description.
- Establishing an annual budget and ensuring that the association has adequate resources to carry out its mission.
- Maintaining links with the member school districts to ensure that the organizations leaders are aware of—and if necessary act on—issues that might affect the members.
- Participating in state and national functions, including advocacy at the state capitol and in Washington, D.C.
- Making a commitment for each individual board member to attend all board of directors meetings and prepare in advance for the discussions.

Just as these functions will be carried out in different ways in different states, the structure of state school boards associations will also vary. For example, some have more active executive committees, made up of association officers and possibly others. As established in the bylaws, the function of such executive committees is to meet and make decisions at times when the full board will not be meeting, such as between meetings of the full board. Often the executive committee will evaluate the executive director, usually with input from other board members. Most experts in the field suggest that the executive director's evaluation be made by the executive committee because its members are in the best position to know about the executive's day-to-day activities.

Again, depending on the association, other committees may take on some of the responsibilities that would otherwise fall to the full board. For example, some associations have standing or ad hoc committees that help develop the association's workshops or annual conference; take an active role in developing resolutions for consideration by the delegate assembly; serve as audit committees to oversee association finances; or lobby at the state or national levels.

As noted above, individual board members often will be asked to link member school boards to the state association. This is an important role, as the board member—often known as an area director—really serves as the eyes and ears of the association in the field. The bond between the association and its members is critical in ensuring that the association has the resources and support to carry out its mission.

In addition, the board usually serves as a link with other associations and organizations, both within the state and in other states. For example, some boards meet with their state board of education, state department of education, or with their state superintendents associations. Individual members, representing the association, may attend functions with other groups or serve on their committees.

To ascertain their effectiveness, state association boards of directors—like school boards—will periodically conduct self-evaluations. These self-evaluations are aimed at strengthening the board, and thus the association, and may be done with the help of a skilled facilitator. One reason for conducting such evaluations is to ensure that the board is working within the broad constraints of its mission statement.

Such an evaluation should be done prior to evaluating the executive director in order to ensure the board is carrying out its responsibilities, such as providing direction to the executive director. If the board is not doing so with “one voice,” the work of the executive director will be much more difficult.

Another option for organizational improvement is available through the National School Boards Association Program & Operations Review Service. NSBA coordinates an on-site peer review of association governance, operations and programs, resulting in a written report offering recommendations and strengthening guidance.

Fiduciary Responsibilities

Members of a state association board often must learn a number of things before they can be fully effective in the role, just as it often takes members of local school boards a year or two to fully understand their roles and responsibilities. For example, individual board members should keep in mind that their authority comes from what they do at the board table, not from actions taken in their personal capacities, unless the board has delegated authority to them. Thus, board members should not commit the board to action unless this has been approved by a vote of the board.

One of the most important roles of board members is that of carrying out their fiduciary responsibilities. To protect the members of an association, state laws generally hold that when dealing with issues concerning money or other assets of the association, board members have the duty to act as a “fiduciary” (that is, one party that holds assets for another party, often with the legal authority and duty to make decisions regarding financial matters on the other party’s behalf). Failure to act as a fiduciary, combined with a loss of assets by the association, could lead to personal liability.

Three basic duties fall under the board’s fiduciary duty. In a January 2002 article in *Association Management*, Robert M. Portman describes the three as follows:

- **The duty of care** “means that volunteers are required to exercise ordinary and reasonable care in the performance of their duties, exhibiting honesty and good faith. The duty of care also includes the duty to protect confidential association information.”
- **The duty of loyalty** “requires board members to pursue the best interests of the organization rather than [their] own personal or financial interests or those of some other individual or entity.”
- **The duty of obedience** “requires the volunteer to act consistently with the organization’s mission and purposes and its articles of incorporation, bylaws, and other policies or procedures.”

State association board members can look to many of the requirements of the federal Sarbanes-Oxley Act to assist them in trying to meet their fiduciary duties. Most of the provisions of the Sarbanes-Oxley Act apply only to publicly traded companies. However, the general aims of the act—to provide a more accurate financial picture of the entity to stakeholders and to improve the board’s role in overseeing financial audits and transactions—are easily applicable to state school boards associations.

Many of the act’s more specific requirements can also be applied. For example, state school boards associations should adopt policies on document destruction and whistleblower protection, requirements that are applicable to all entities, including nonprofits. State associations also may want to take greater control over the audit function to ensure that fraud is detected and prevented and that the association’s financial statements are accurate.

The Sarbanes-Oxley Act recommends other steps that boards may consider, including (1) establishing an audit committee that includes a financial expert; (2) taking measures to ensure auditor independence; (3) establishing a conflict-of-interest policy; (4) making certain financial disclosures; and (5) seeking training on accounting and auditing.

In addition, the revised IRS 990 form, which virtually all school boards associations must file, requests much information about the practices of 501(c) organizations. While some of what is requested is not mandatory, the form provides questions that may lead to better

practices once considered by the state association. The information provided by all nonprofits is available on Guidestar.com for anyone interested.

Findings of failure to carry out fiduciary responsibilities are rare among members of state school boards associations. Nevertheless, it is wise to remember this rule of thumb: Board members can generally carry out their fiduciary responsibilities by acting as a reasonable and prudent person would under the circumstances. For example, when considering a proposed action, such as paying expenses for someone who has nothing to do with the board, the board members should ask themselves, “Would a reasonably prudent person take this action?” Several years ago, members of one association board (not a school boards association) found themselves in deep trouble by paying what were considered unreasonable salaries to the executive director of a national organization. It has taken years for this organization to rebuild its reputation.

Several types of insurance are available to cover the association, board members, and staff in the event that a lawsuit arises out of action taken by the association, the board, or its employees. General liability policies, for example, cover such issues as negligence on the part of the association or its employees. Errors and omission insurance, also known as directors’ and officers’ liability, covers board members and some association executives for various alleged or real civil wrongs. Policies also are available to cover errors in dealing with employee benefits; lawyers’ professional liability (if you have attorneys on staff who provide legal counsel to school boards); and even crime, such as embezzlement committed by association employees.

It is important to ensure that your association is covered to the extent appropriate to protect the association and members of the board. Not every situation may be covered, and in some areas it might be appropriate to have high deductibles or even to go without any insurance. Still, knowing there is at least some protection can help you sleep better at night. Ask your association executive director for a report on association coverage if you want to know more about these issues.

The Role of the Executive Director

The Executive Director’s Job Description and Evaluation. Just as the superintendent is the chief educational officer of a local school district, the executive director is the chief executive officer of the state school boards association. In most state associations, the executive director is given the responsibility of hiring, managing, evaluating, and even firing staff members. Sometimes this is defined in contract language, sometimes in the bylaws, and sometimes in the association’s policies.

As chief executive officer, the executive director has responsibilities in areas such as the following, taken from the job description of one state school boards association’s executive director:

- Attending meetings of the board of directors and its executive committee; keeping the board of directors and executive committee fully informed on the financial and

operational status of the association; developing board meeting agendas with the president; and providing leadership and support services for the decision-making process.

- Taking a leadership role in the formulation of policies, procedures, and programs by the board that will further the goals and objectives of the association.
- Implementing association policies and specific decisions of the board.
- Maintaining the official minutes of the association and all files, records, legal and historic documents, and membership and mailing lists.
- Executing such contracts and commitments as may be authorized by the board or by established policies.
- Developing, recommending, and operating within an annual budget; controlling and accounting for expenditures; preparing financial reports; acknowledging and investing income; approving all purchases; and arranging for an annual audit in cooperation with the association's treasurer and finance committee.
- Establishing a sound organizational structure for the association office.
- Recruiting, hiring, training, supervising, evaluating, and motivating all members of the association staff and, when necessary, terminating employment in accordance with policy.
- Securing maximum performance of staff members by clearly defining their duties, delineating lines of communication and authority, establishing standards of evaluation, conducting periodic performance reviews, and maintaining a competitive salary structure.
- Directing and coordinating all approved programs, projects, and activities of the association staff.
- Providing the necessary liaison and staff support to committee chairpersons and committees and enabling them to function efficiently; ensuring that committee decisions and recommendations are submitted to the board of directors for approval.
- Promoting interest and active participation in the association's activities by members.
- Developing educational programs to meet the needs and advance the skills of the membership.

- Working to promote and expand association membership and membership services.
- Directing communication with the membership and the public and serving as publisher of official association publications.
- Maintaining effective relationships with other organizations and agencies and enhancing the position of the association and its members.
- Providing visibility for the interests of the association with the state legislature and other agencies and associations.
- Serving as spokesperson for maintaining high-quality public education under the control of local and regional boards of education.
- Providing support services to the president.
- Carrying out such other general responsibilities as may be delegated by the officers or board of directors.
- And, the ever-present charge: performing any other duties which may be assigned from time to time.

Although many of these responsibilities are quantifiable, many are not. The executive director serves not only as the chief operating officer of the association, but will often be a close advisor to its leaders. For that reason, it is beneficial to the association and its elected leaders to ensure that the executive director is privy to the concerns and issues facing them.

It is recommended that the executive director be evaluated once a year. This is usually specified in the executive director's contract. Usually, too, the executive committee or full board of directors and the executive director agree on the evaluation instrument to be used.

A number of evaluation instruments are available. Whichever one is used, the evaluation should be based, at least in part, on the job description. It is only logical to evaluate staff members on what they have been directed to accomplish. In addition, the job description may play a role in certain legal situations in which it is critical that roles and responsibilities have been specified—for example, when the executive director is unable to fulfill the job requirements because of a disability.

In addition to the job description, the evaluation may be based in part on how the executive director performed in relation to goals set for him or her the year before. Some associations also use the goals of the association as a basis for at least part of the evaluation; these goals usually are established by the association's strategic plan.

While a formal evaluation of the executive director is usually done pursuant to the contract, the executive committee should have periodic discussions with the executive director to discuss issues that might arise between them. Clearly, it is not in the association's or the executive director's interest to let concerns about either's actions or words fester.

The Executive Director's Contract. Most (42) state school boards association executive directors have contracts with their associations. In 31 of these states, the length of the contract varies from one to six years; 21 of these contracts are for three years, one is for six years, and nine are for one year.

In addition to duration, provisions in such contracts may include:

- The executive director's responsibilities, in broad detail, including the authority to hire, fire, and compensate staff.
- The executive director's compensation, including salary; pension; health, life, disability, and dental insurance; and severance benefits.
- The executive director's right to attend all meetings of the board of directors and executive committee, except when the executive director's performance or compensation is under consideration.
- The executive director's right to be reimbursed for expenses.
- Encouragement for the professional growth of the executive director.
- Conditions for handling possible consulting or other outside work.
- Provision for nondisclosure of confidential information.
- Assurance that the executive director is held harmless from liability.
- Requirements for renewal, expiration, and termination of the contract.
- Other legal language covering effects of the contract, severability, and other notice and waiver provisions.
- Signatures of both parties. (Usually the president will sign on behalf of the association).

We should reiterate that while the contract, job description, and evaluation provisions are formal, the relationship between the board and its executive director ideally will be based on mutual respect and trust and sealed by frequent and beneficial communication.

The Business Side of the Association

The business of a state school boards association is clearly different from the business of a local school system. While state association boards of directors are often quite conversant with and knowledgeable about raising revenues and making expenditures in their local school districts, they do not always understand the fiscal end of their association's operations. For example, school boards receive almost all of their operating funds through taxation of local residents and from appropriations and grants from the state and federal governments. Associations usually receive the bulk of their revenues from dues and often receive substantial additional funding through non-dues revenue. A state association generally has no guaranteed income, no appropriated funds. Unlike a local school district, which begins each fiscal year with a guaranteed budget, the school boards association begins each fiscal year with no guaranteed funds. The association must raise 100 percent of the association budget by developing respect and trust and offering services and programs that are valued by the membership.

All associations need adequate funding to operate. Staff must be paid; office space must be bought or rented; office furniture, supplies, and equipment must be bought and maintained; and travel, lodging, and other expenses, depending on the activities of the association, must be paid for. Dues paid by member school boards make up varying proportions of a state association's revenue, ranging from about 6 percent to 86 percent, with an average of around 43 percent. Most of these members are local school boards, though some might be charter schools or other groups. Generally, there is no requirement for a local school board to pay dues. The New Jersey School Boards Association and the Washington State School Directors' Association are two exceptions to this rule.

Additional revenue is often raised through the development of business partners or affiliates, who provide money to the association in return for visibility to the membership and other services or activities, such as advertising in association publications. In addition, many of the services, activities, and programs carried out by the association raise non-dues revenue. Those with a large impact on the budgets of some associations include insurance programs, professional development programs, publications, policy and employee relations services, and other consulting services. All of these sources of revenue are voluntary, not guaranteed.

One of the most helpful activities members of state association boards of directors can carry out is finding additional sources of revenue for their associations. Identifying a new business partner or a company that wants to sponsor an event can be beneficial to the association's bottom line.

In summary, the fiduciary responsibilities of board members should be focused, in part, on the association's need for resources to carry out its mission and goals. In addition, the board has a critical role in setting the budget, determining dues, and ensuring that a financial audit is conducted once a year. It is also helpful if the board of directors can find ways to promote the association in order to help raise revenue.

Building Leadership on the Board of Directors

The more people feel they are part of an association, the more likely they are to value and support it. For that reason, many association staffs and boards focus intently on outreach to their members. An important question is, how can board leaders ensure that effective candidates are groomed for positions as members or leaders of the state association board?

Associations that engage local school board members in the activities of the organization are more likely to develop a cadre of interested people who will consider running for association office or for a seat on the board of directors. The association's committee system can be used to identify members who have leadership skills and are committed to the work of the association. In addition, some state associations use veteran school board members as mentors and trainers, which can enhance their leadership skills. Veteran board members can also testify before legislative committees, participate in the state and federal legislative network, or serve on focus groups and strategic planning task forces. Often, too, specific leadership training of the entire board or in the regions will identify and strengthen the skills of potential leaders. The current board of directors will find it valuable to discuss ways to ensure that there is a cadre of experienced school board members who might be interested in joining the association's board. It is also valuable to ask current members, as well as the staff, to identify talented individuals who may want to serve. Many associations—particularly those with regional representation—have a process in place, including a nominating committee, to screen these candidates.

No matter how board members are identified, however, it is always the responsibility of all sitting board members to help the association identify and groom the next generation of board members.

PART II: SCHOOL BOARDS ASSOCIATION WORK AND LOCAL SCHOOL BOARD WORK

In theory, state school boards associations are like other associations, but there are some differences that can create problems for the association. One interesting issue is that the boards of directors of school boards associations are made up of members of local school boards. In other words, one must serve on a local school board to become a state association board member. Thus, they are elected with constituencies that support them and sometimes political parties that have endorsed them. That is not true of any other state association within the education community. Further, because of their experience on their local school boards, some new association board members believe they have the knowledge and skills to be effective board members at the state association level as well. However, there is no existing frame of reference from which local school board members can draw when they become members of a state association board of directors.

Basic Similarities and Differences

The common mission of state school boards associations and local school boards is to improve the achievement of students and the opportunities available to them in the public schools. The efforts and activities of the two entities, however, are not the same. School boards focus their attention and efforts on the needs and achievement of the children in the local school district. State associations, in contrast, focus their efforts on the shared interests of the state's local districts.

There are clear differences between the work of a state school boards association and a local school board and clear differences in the roles of members of the state association board of directors and their roles as local school board members. There are also some parallel responsibilities. For example, the local school board member is responsible for developing policies and educational opportunities that are in the best interests of the students in that district; performance of that role includes focusing on curriculum and the local budget. That same person's role on the state association board of directors might instead include consideration of association professional development programs and the association budget.

As NSBA's Key Work of School Boards framework sets forth, local school boards are responsible for adopting a vision for their district, establishing learning standards, aligning resources, assessing performance, enhancing school climate, fostering collaboration, defining measures of accountability, and monitoring continuous improvement in the district. In short, local boards are responsible for defining the district's needs and direction and supporting students' growth in academic achievement. Local boards also are charged with the governance of their districts, including policy and budget adoption and oversight, curriculum adoption, staffing and appraisals, student issues, school facility issues, and determination of policy and procedure disputes. With these more specific responsibilities

comes the additional charge of communicating with and engaging the community to understand the district's needs, challenges, and successes.

Understanding the mission, establishing vision and direction, setting goals, and communicating effectively about the needs of the entity are parallel responsibilities of association board members and local board members.

However, the work of the association is to advance the common interests of all school boards in the state and provide services and support to enhance the efforts of those boards within their districts. The work of the local board, by contrast, is to meet the educational needs of the students of their district.

Many of the responsibilities of local school boards are defined in state legislative codes. In most cases, a local school board member, when functioning within the local school district, governs in the best interests of the students, staff, and citizens of that district. In every state, school districts tend to differ from one another in terms of the challenges they face, the issues that arise, the culture of the school system, and the demographics and economics of the community. Nevertheless, the core mission for all districts is continued improvement of student achievement.

State school boards associations have been established to provide a state-level network for members of local school boards to achieve common goals, support shared improvement efforts, and explore such widespread issues as board member training, policies, statewide needs, state and federal initiatives, and state and federal funding. Improving student achievement also must be a goal since it is the top priority of the state association's members.

The association network also provides the ability to share common problems, best practices, and successes. Thus, although the work of the local board and the state association is different, it is often interrelated. Policy development provides an example: Local school boards are responsible for adopting policies on a variety of subjects, while state associations often provide training, information, and samples of effective policy development that local boards can use to do their work well.

Like local boards, state associations value the common support a network provides and have united to build a nationwide network through NSBA. This network further supports the common issues and needs of America's public schools. It also provides a united voice in national conversations and initiatives that affect the work of the state associations and, thereby, the abilities of local school boards to govern and advance local educational initiatives.

Focusing the Agenda on Strengthening Local Boards

The mission statement, bylaws, policies, and agendas of the state school boards association should reflect the common issues and values of the local districts that belong to the association. Similarly, the state association's strategic plan and program of activities should

address these common interests and values. And the agenda for meetings of the board of directors should also make it clear that the board is working toward the common good of the members.

During the discussions of agenda items, it is important that members have the opportunity to explain how specific issues affect districts of different sizes, cultures, and needs. For associations to be effective and remain strong, it is vital that no segment of the association membership be sacrificed for the sake of another segment. Therefore, agendas and the discussions around agenda items should provide opportunities for deliberations that will establish common ground.

That said, deliberation of issues that are not common to the entire membership should not be discounted. Often, precedent-setting issues are raised in one district that should be brought to the attention of other districts, either to raise awareness or to gain support. Legal questions, contract challenges, and negotiation concerns are among the more common issues of this kind.

It is also important for members of the state association board of directors to understand that their vote on issues before the board should be in support of all members. This sometimes means that particular issues that resonate in a local district might not have state association support if the issues do not have statewide ramifications.

In most state school boards associations, members of the board of directors, once elected, represent more than one local district at the state association level. This parallels the role of a local school board member, who may be elected from a particular electorate area but, once elected, represents all the children of the district. The responsibility of each member of the board of directors is to bring regional issues to the table, to listen to discussions from the other regions, to communicate these discussions back to his or her region, and to support the decisions of the majority of the board on the impact statewide.

This can create a conflict for association board members, either with the local districts in the region they represent or in their own local boards. Thus, it is important that the discussions of the association board of directors give ample time for understanding the role and relationship of the association to the member boards on relevant issues.

Reinforcing the Role of Local Boards

Through their goals, strategic plans, and agendas, state school boards associations have the opportunity to continually reinforce the concept of advancing the common interests of the local school boards. They also have the opportunity to develop and design services and supports for those boards that can be provided more effectively and efficiently through a broader network.

Additionally, larger meetings, such as delegate assemblies, reinforce the mission of working for the common good of all school boards and districts. By bringing issues to a fuller debate, the board of directors expands the discussion of issues facing local boards, thereby

giving stronger direction to the board and staff concerning further work or the development of new initiatives. These meetings also provide a broader opportunity for local districts to express concerns and receive feedback as to whether the issue at hand is a common one or a local problem.

This local versus state debate might turn on such issues as construction impact fees. Consider this scenario: A local school district presents a resolution to the delegate assembly requesting that the state association challenge a local town's impact fees, which the district considers inadequate and inequitable. While this might be a serious problem for that district, it might not be a concern for the entire state. On the other hand, it could be a bellwether issue that signals a statewide trend. The deliberation of the delegate assembly could determine whether the association should assume leadership on this challenge, or whether existing association services could provide support for the district that presented the resolution—and for other districts, should a similar situation arise elsewhere.

Delegate Assemblies

The delegate assembly represents one major difference in the leadership and structure of a state association and the leadership and structure of a local school board. Local school boards meet regularly as a whole and define the goals, policies, and direction of the district. On the other hand, state school boards associations, and NSBA, convene delegate assemblies to define changes in policy or bylaws and to establish legislative priorities. Most state associations convene a delegate assembly once a year to set the operational and legislative platforms for the work of the association staff. A few associations convene their delegate assemblies twice a year. Another exception is the Delaware School Boards Association, which includes a representative from every local school board in the state on its board of directors and legislative committee and consequently does not have a delegate assembly.

The work of the delegate assembly is important for several reasons. First and foremost, its deliberations and actions are crucial for guiding the focus of staff work during the months between delegate assemblies. This is especially important for outreach on legislative issues and development of positions and programs. Additionally, the focus of the board of directors at its meetings may also be determined by the priorities of the delegate assembly.

The delegate assembly also provides an opportunity for dialogue among a broader representation of the state's school districts than is the case at meetings of the board of directors. Through the resolution process, the delegate assembly allows local school districts to submit legislative positions they consider important directly to the state association leadership.

The importance of the delegate assembly's deliberations cannot be overstated. These deliberations are critical to association work. Election or appointment as a representative to a delegate assembly is a significant opportunity and should be taken seriously. It is the responsibility of members of a state association board of directors to emphasize

participation in these events and to take part themselves. Most association bylaws specify what constitutes a quorum at the delegate assembly and the percentage of affirmative votes required to adopt changes and resolutions. If there are not enough representatives who are willing to participate, to become informed about the issues, and to debate and vote on those issues, the strength of the association's commitment is diminished.

Interaction and Involvement with Staff

In a state association, as in a local school district, it is valuable for board members to be visible and to know and interact with members of the staff. This visibility gives the association staff and the membership an opportunity to interact with and understand the people who are setting the direction of the organization. It can also give the board member another way to understand the staff's efforts to meet the goals of the association, to hear about the resources necessary to provide services, and to become aware of the accomplishments of individual staff members.

The executive director, it's worth repeating, is the chief executive officer of the association and is responsible for overseeing and managing the work of other employees. It is never the responsibility of a member of the association board of directors to micromanage staff members, to direct a staff member, to request personal information, or to reprimand staff. Likewise, it is not appropriate for a staff member to complain or give inappropriate information to a board member; nor should an association board member encourage a staff member to engage in such discussions.

State association trainers and training manuals for effective board service emphasize how to build communication and trust and how to effectively balance the differences in the roles of the board and the superintendent. Through such professional development, local school board members learn their roles and responsibilities, including to communicate disagreements in private and never to surprise the superintendent at a meeting.

In the same vein, it is never appropriate for a state association board member to surprise or undermine the executive director. If a staff member is attempting to undermine the chief executive through inappropriate contact or conversation with a board member, the executive director should always be apprised. Likewise, if a board member is initiating inappropriate conversations with a staff member, the executive director should be made aware of that situation as well.

In a state school boards association, as in a local school district, operational policies or procedures should reflect an appropriate channel of communication. An organization cannot thrive and grow unless a profound level of trust exists among its employees, leaders, and volunteers. Any behavior, on the part of anyone involved, that undermines the chain of command ultimately undermines the trust, effectiveness, and potential of the entire organization.

Additionally, the relationship of the executive director with the board as a whole and with individual board members should be one of open communication and trust. Problems

within the organization should be discussed with the executive director in a timely fashion so that an investigation can be undertaken and a solution reached as quickly as possible. Issues to be discussed at a board meeting should be placed on the agenda through the proper protocol and with full disclosure to the executive director of the intent and the details.

State association boards of directors meet at various times during the year. According to a recent survey of the Federation by NSBA, many meet quarterly; others meet five, six, or even nine times a year. Between meetings, it is usually the role of the board president to be the liaison who works with the executive director to ensure good communication with the members of the board of directors and the member districts.

Below is information on two of the most important activities provided by most state associations, policy services and legislative advocacy.

Association and Local Policy Issues

A clear parallel in the work of state associations and local school boards is developing effective and appropriate operational and legislative policies. Both state associations and local boards are organizational entities that need structure to support their work and accomplishments. State association board members not only provide the leadership of the association, but they also work as a team to develop the services, programs, and activities the association provides for effective support of the member districts. The policies of the association supply the structure necessary for staff members to support member school boards.

Often a state school boards association will offer a policy service that provides support for sound local school district policy. This support might entail training boards on effective policy development, giving advice on policy language, supplying samples of effective policies on a variety of subjects, or providing organizational support for policy manuals. Many state associations also provide information on state or federal policy mandates, along with sample policy language on those topics.

It is not the association's responsibility to adjudicate policy disputes within a district, but it is the association's responsibility to support the work of local boards on operational policies that have been adopted in the district. Citizens often call the state association office with concerns or complaints about a policy their local board has adopted. When that happens, the association staff member generally supports the local board by explaining policy to the citizen or explaining how to use the district's policies or procedures to address the concern. Often, too, the association staff member can supply the name of someone in the district the citizen can contact to discuss the issue. This process of supporting the policies of the district is a parallel responsibility of state associations and local school boards. Local board members are often called about problems or concerns within the district and, with effective training, use the policies as a basis for understanding an issue and providing a solution to a problem.

Legislative Efforts

One of the greatest advantages of membership in a state association is the work of its legislative department. Most state associations have staff members who are charged with monitoring state and federal legislative actions. Their role is to initiate legislation of importance to the school districts, oppose legislation that contradicts the positions or the prerogatives of state associations and local boards, to develop grassroots outreach systems, to speak on behalf of the interests of the membership, and to communicate regularly and effectively with local school board members.

State associations set their legislative priorities in several ways. Often, the delegate assembly determines which issues should be addressed. Sometimes these issues entail initiating legislation to rectify difficult or inequitable situations that have been brought to the assembly's attention. Most associations have legislative committees that deal with legislative issues on a more regular basis. These committees respond to proposed legislation, monitor the initiation of association-sponsored legislation, set legislative priorities and provide feedback to the board of directors and the legislative staff. An important part of their work is to support and reinforce grassroots lobbying calls to legislators.

The grassroots efforts of local school board members are critical to the strength and reputation of the association itself, at the state general assembly level and the federal congressional level alike. State legislators often say that one or two calls on an issue signal an interest in the matter, but 10 or more calls signal that it is a significant issue. Local board members must be engaged in discussing pending bills with their legislators if they hope to influence the outcome of the legislature's debate. This means they must be knowledgeable about the issue involved and the proposed legislation. They must also be aware of possible problems with the legislation and with any unintended consequences that are not apparent in its language. It falls to the legislative staff of the state association to provide that knowledge and to arm local members with the details they need for informed conversations with their legislators.

Many state associations have developed a network of contacts in local districts or regions to call on for lobbying efforts. This intensive and deliberative operation of the association's legislative staff is generally more comprehensive and more complicated than lobbying efforts at the local level, although it does lead to action by local school board members in contacting their legislators.

Communication between the state association legislative staff and the designated local contacts is a two-way affair. For its part, the legislative staff monitors legislative activities, learns what the legislation says and what its impact and unintended consequences will be for local school districts, and disseminates that information to local legislative contacts. The local board members are expected to contact and discuss the issues with their legislators, receive feedback from them, and relay that feedback to the association staff.

Coordinating the feedback from local board members who have been in touch with legislators is much more important than many realize. The feedback local voters receive from legislators can directly affect the focus of the association's lobbying efforts. It can help the staff understand where the strength for support or opposition to a bill lies, identifying where further efforts are necessary in the legislature. Additionally, knowing who has contacted which legislators gives staff members information to use when they get to the state capitol, including how many contacts have been made on a particular issue. It is not unusual for legislators who do not want to oppose a bill to tell an association lobbyist that they haven't received any calls on that issue. When the staff member has data that says otherwise, the conversation can take a different direction.

The leaders of a state school boards association are responsible for promoting support and feedback on legislative issues. This includes active participation in the process and encouragement for local school board members to be engaged in the legislative process through the association.

Determining the success of legislative efforts of any association is difficult. While favorable results such as ensuring increased funding for public education is easily seen and recognized, it is often difficult to determine whether it was the work of a school boards association, specific districts and/or legislators, or the combined work of associations, boards, and others, such as superintendents groups or unions, that led to the success. In addition, sometimes "killing" bills is every bit as important to association members as having bills passed. It is important to keep these factors in minds as one evaluates the legislative efforts of the association.

Association Business versus School District Business

Part I addressed revenue generation in school districts and state school boards associations. To recap, school districts receive revenue through taxes and state and federal allocations and grants, while their associations must derive revenue through services that are valuable to the membership.

Joining the state association brings a local school board distinct advantages, which are enabled by membership dues. Among these are the opportunity to have a voice in the direction and activities of the association; the opportunity to voice opinions and to vote on positions the association takes; communications on state and federal legislative issues; access to additional services and expertise, whether as a function of the dues or as for-fee services; and training and networking opportunities with other local school board leaders throughout the state and the nation.

In addition to dues revenue from local school boards, state associations can derive dues revenue from other types of members as well, such as corporate and associate members.

Notably, state associations can also receive funds from sources not available to public schools. For example, they commonly charge fees for services provided to local districts. The for-fee services most frequently provided are insurance programs, professional

development programs, policy and employment relations services, legal services, policy development services, research services, superintendent and administrator searches, and other consulting services.

Another source of income for some state school boards associations is the sale of topical publications or subscriptions to regularly scheduled periodicals, such as newsletters or magazines. This varies from state to state, with some charging for the publications and some sending all publications to the member districts as a benefit of membership.

The common goal of public school systems and state associations is continuous improvement of student achievement; however, the mission and means of reaching that goal are different. Public school systems are charged with providing equal opportunity for all local children to a free public education. They do not charge for services above and beyond a basic per-pupil cost. They are required to provide for the differences and diversity within the school system. In contrast, dues to an association often provide basic membership benefits with auxiliary support that is billed as needed and used.

In public school systems, any student, depending on need, has the right to a wide variety of services, which are defined by each state's constitution, laws, and judicial decisions, as well as by local school district policies. In an association the same is not true. An association, through its bylaws and operational policies, must establish its "worth" through services that provide value and meaning for a school board. It also must establish value and expertise by motivating members to request the services it provides. State associations cannot be viable business entities unless they develop a business that can sustain itself on the basis of the value of membership and of the services and expertise the association provides to meet the needs of local districts.

PART III: ASSOCIATION LEADERSHIP

Setting the Vision

Developing a shared vision that reflects the common values and core beliefs of the association is critical. This shared vision, or strategic plan, serves as the foundation for the mission and goals that not only direct the association staff and board of directors, but also help build support and commitment for the association among local school boards and superintendents. Getting stakeholders from across the state involved in creating the plan can help generate support for the resources necessary to make the vision a reality. Usually developed by the board of directors, the strategic plan should be approved by the delegate assembly of the association, which then transfers ownership of the plan to the entire membership.

The association's strategic plan should be a user-friendly document and a living part of the organization, not simply another notebook on the shelf. Moving the plan from paper to practice is the real challenge. The vision comes to life in the day-to-day actions of everyone in the organization. Engaging a cross section of school board members in developing the plan makes it more likely that the vision will be achieved. Keeping the staff and membership informed of the status of the plan is essential. Never take it for granted that your staff or your membership knows where you will be putting your efforts or the status of these efforts.

While the board is charged ultimately with approving the long-range plan, the staff and executive director play a key role in moving the association in a new direction and maintaining the momentum as the volunteer leadership changes from year to year.

Once the board approves the strategic plan, it is important to remain focused on the big picture and allow the staff to implement the plan. Different association boards monitor their strategic plans in a number of ways. Many boards align their agendas to closely follow their strategic goals. This type of structure helps prioritize the work of the association board and ensures that the activities are tied to the core of advancing the vision and mission of the association.

Other suggestions on how to monitor the plan include the following:

- The executive director provides an update on the progress of the plan at each board meeting as well as an annual update.
- The association budget directly relates to the plan.
- Evaluations of the executive director and staff members are tied in part to their responsibilities for implementing the plan.

- The executive director provides an annual update on the plan for the full staff and membership, in addition to the board of directors.

Another tool used by many state associations in their planning process is the NSBA Program and Financial Review, which is carried out by members of the NSBA staff. The purpose of the review is to assist a state association's board of directors and staff in its continued decision-making and long-range planning efforts. The review process systematically assesses the effectiveness of the association's programs and activities and the positions, descriptions, assignments, and responsibilities of association staff members in relation to the goals and objectives of the association.

Generally, the review team focuses on the following:

1. The association's program and operations in the specific areas of
 - governance, organization, and structure;
 - current programs and services; and
 - planning and membership development.
2. The association's current management operations in the specific areas of
 - budget and administrative practices;
 - fiscal reporting procedures and general financial controls;
 - financial computerization;
 - financial reserve philosophy and practice;
 - ratios of dues revenue and for-fee services revenue; and
 - staffing, general management, and facilities.
3. The association's current operations in the specific areas of internal and external relations with
 - member boards and superintendents;
 - local and state governments;
 - other education organizations;
 - the business community; and
 - the news media.

As part of strategic planning and program reviews, some state associations have successfully used focus groups. This process allows the staff and board to bring in a cross section of stakeholders to gain insight concerning such matters as programs and services, dues structure, and governance issues.

While using any process with outsiders, whether focus groups or surveys, board members should keep in mind that they will make the final decision on what is contained in the strategic plan.

The Board's Commitment and Buy-in

Any association is a group of people who voluntarily come together to solve common problems, meet common needs, and accomplish common goals—as well as to learn about and from each other. Members of state association boards of directors should be strong advocates of the association. However, before they become advocates, they must have evidence that the association's programs and services are exemplary. As one executive director said, "The best way I can get my board to support the association is do a good job, do a good job, do a good job."

Research tells us that there are three keys to sustaining success and gaining support from members. They are:

- Develop a reputation for value—that is, a portfolio of "good stuff" and a "good staff."
- Establish a culture based on trust and high communication.
- Have a flexible infrastructure that allows you to quickly seize opportunities to create value.

Dealing with Board Dynamics

Knowing and understanding your association board colleagues are keys to establishing, building, and maintaining good working relationships. It is important to know more about your colleagues than just their professions or political affiliations, however. You should also know where they live, for example, and whether they have children in school. As one board member put it, "You will be making crucial decisions together that will be impacting the state. You will be trying to influence them and they you, so you will need to find out where they are coming from."

Some state associations have found that an intensive one or two-day workshop on group process can help build better relationships. Having a good understanding of each other's desires and needs goes a long way in helping board members work in concert and accomplish more together.

Board members who don't think and act as part of the team and are difficult to get along with often become ineffective. Their behavior literally takes them out of the decision-making process, which is a loss to the entire board. How should your board respond and bring a dissident back on the team?

The following suggestions should help:

- Don't attack or scold another board member in the boardroom. You will only make things worse.
- Meet with the person outside the boardroom to discuss areas of disagreement. Often, this is done by the board chair or president, whose role is to keep the board operating effectively.
- Restrict your discussions to board matters and concerns.
- Do not resort to personal attacks on one another—they are neither helpful nor appropriate.
- Always try to respect the other person's opinion.

Dissidents do not always undermine the board operations, however. Those who play the dissident role for power's sake or to elicit favors or concessions from other board members can indeed be destructive. But board members who are "position dissidents" may prove beneficial by causing other board members to discuss and define their personal positions on issues. Their behavior can help keep the board and the association staff on their toes.

You may also have board members who aren't causing any real problems but who nevertheless arouse resentment because they simply don't carry their share of the load in terms of board work. In such cases, there are steps you can take to get these individual board members involved in board activities.

Here are a few suggestions:

- In personal conversations, point out these board members' areas of expertise and suggest they get involved in these areas of the board's work.
- Be mindful of these board members' strengths when making committees appointments.
- Have the executive director or president take these board members with them when they visit local boards.
- Ask for these board members' opinions, and listen honestly and openly to what they say.

- Encourage them to attend their state association and the National School Boards Association's meetings designed to develop association leadership.

Orientation for New Association Board Members

Clearly, serving on a state association board is quite different from serving on a local school board. Decisions are made at the state level that can affect children statewide—not just those in the local district. For this reason, new members of a state association board of directors should be oriented as soon as possible after taking office. Following is a brief outline for a possible half-day session:

- Welcome and introductions
- Review of the association's history, bylaws, policies, and strategic plan
- Review of the roles and responsibilities of the board of directors
- Review of the executive director's role and responsibilities
- Review of the association's financial structure
- Review of the association's organization, staff, programs, and service
- Review of the NSBA Federation and National Affiliate program
- Review of NSBA programs and services for state associations and how they can enhance state association work.

In addition to the general orientation, new association board members can benefit from:

- An annual board self-evaluation
- Board retreats
- Visiting the meetings of other local school boards
- Discussions on important issues
- Staff briefings on education programs and activities
- Attending state school boards association meetings as well as NSBA conferences and workshops, including the NSBA Presidents' Retreat, the NSBA Leadership Conference, the NSBA Federal Relations Network Conference, and the NSBA Annual Conference.

Retreats for the Board of Directors and Senior Staff

The purpose of a retreat is to improve communications, strengthen mutual respect, and establish a clear understanding of the roles and responsibilities of the board and the executive director. The participation of all or most of the association's board is important. Discussion often revolves around identifying organizational concerns, resolving conflicts, and building a team approach to decision-making. Some boards find that the retreat is also a good time for them to evaluate their operations using a self-assessment.

A Possible Self-Assessment for the Board

The following issues might be addressed in a state association board's self-assessment:

- Does the board place the needs of the membership before personal or political gain?
- Does the board demonstrate a sincere and unselfish interest in public education?
- Does the conduct of the board promote a positive image of the association?
- Does the board make decisions based on what is good for members of the association as a whole?
- Does the board work to ensure that available resources are allocated on the basis of association priorities?
- Does the board view itself as a corporate board of directors?
- Does the board maintain open and constructive relations with the membership?
- Is the board committed to association efforts to communicate with the membership and other key publics?
- Does the board maintain visibility, participating actively in association affairs?
- Does the board conduct meetings in a businesslike manner, following accepted parliamentary procedure?
- At its meetings, does the board consider both information and action items and allow sufficient time for discussion?
- During board meetings, does the board insist that its members be polite and treat board colleagues, association personnel, and others with respect?
- Does the board ensure that the amount of time spent on each agenda item is appropriate in terms of the item's importance?

- Does the board provide the executive director a clear statement of its expectations for his or her performance and use those expectations in an evaluation?
- Does the board work with the executive director to achieve a climate of good faith and good will through teamwork and clear communication?
- Does the board display confidence in the executive director by making decisions concerning the association after considering the executive director's recommendations?
- Does the board operate according to written policies, updating those policies as necessary?
- Does the board avoid using its authority outside of official board meetings?
- Does the board function in a manner that makes its individual members feel a sense of pride and ownership?
- Does the board follow its prescribed role as a policy body and not become involved in making administrative decisions?

In addition to these self-assessment questions, it can be useful to ask individual board members to list:

- What they see as the top three strengths of the state association;
- Three areas in which they would like to see improvement; and
- What they consider the most critical issues facing the state association.

Planning the Agenda for Board Meetings

In most cases, the executive director is responsible for developing the board meeting agenda with the association president. The process for other association board members to place an item on the agenda is usually specified in policy or in association bylaws.

The agenda should be as specific as possible. Some association boards place a time limit on each item to keep discussion flowing, always mindful that good judgment needs to be used if the discussion runs longer than expected.

An important part of the agenda (and an important planning tool) is the background information that relates to agenda topics. This information is generally prepared by the executive director and staff. The agenda document is prepared in hard copy or electronically and sent to board members before the meeting, preferably five to seven days in advance to allow time for study.

In addition to the responsibilities already cited, it is generally the responsibility of the executive director, with the president's approval, to:

- Set the order in which items will be handled during the board meeting.
- Create a pace for the board to conduct business.
- Allow board members time to study and think about complex or controversial matters prior to the meeting.

The agenda generally includes:

- Action items on which the board is expected to reach a decision during the meeting.
- Consent items addressing routine matters such as minutes and monthly expenses, which can be approved together without discussion.
- Discussion items requiring discussion but not action.
- Information items that require no action or discussion unless a board member asks for clarification.

As mentioned previously, some associations that operate with a strategic plan also include on each agenda a report on the status of the staff and board's work to implement the plan. Agenda items relating to the strategic plan are clearly designated as such, making it simple to see how much board discussion at each meeting is truly tied to the mission and goals of the association. Tying items to the association's long-range plan also makes it easy to look back and see how much time is dedicated to the discussion of the strategic plan on an annual basis.

The format and sequence of agenda items is usually as follows:

- Call to order
- Roll call
- Announcements
- Approval of minutes
- Consent agenda
- Financial report
- Reports and recommendations of the executive director

- Discussion items
- Information items
- Comments concerning the board of directors
- Adjournment

The planning and execution of the association's board meeting is certainly important, but the follow-up after the meeting is critical. Here are just a few items to consider:

- Are clear concise minutes sent promptly to all board members?
- Is a report synthesizing board action published in your membership publication?
- Do the association staff and appropriate board members follow up on questions that have been deferred to another time?

A Quick Checklist for Association Board Meetings

- Is the notice of your meetings properly posted? (Some state associations fall under their state's open records act; others do not.)
- Has the board adopted a procedure for setting the agenda and preparing back-up reports and briefings?
- Do staff members understand which matters need to be brought to a scheduled meeting and which do not?
- Do your association president and executive director discuss agenda items and other business and try to anticipate any problems that might occur?
- Are matters to be acted upon reviewed in advance and presented in writing to your board by the executive director?
- Does the executive director specify in advance those items for which he or she has a recommended action?
- Are the meetings held in pleasant, comfortable surroundings that are conducive to effective communication and decision making?
- Do board members come to meetings well prepared?
- If your board has committees, are committee reports or minutes distributed to all members of the board?
- Is the association's legal counsel asked to attend when important legal matters are on the agenda?

PART IV: CONCLUSION

State school boards associations are educational entities that are intimately involved with the needs and priorities of the public schools of America. They were formed to promote, support, and sustain the leadership efforts of public school boards and to uphold the democratic principle of local control of the public schools.

The advancement of educational opportunities—and thereby the educational achievement of all students in America—is the shared goal of local school boards and state school boards associations alike. Although their mission for children is the same, the work of public school districts and that of state school boards associations are different. Local school boards clearly are charged through state law with governing local school districts to provide opportunities for the children in those districts. State associations, on the other hand, were developed to enhance, strengthen, and support that local control and leadership by local school boards.

Likewise, the role of the members of a state school boards association and the activities of that state school boards association are clearly different from the roles and responsibilities of local school board members. The members of the leadership teams of state school boards associations are responsible for advancing the mission, vision, and goals of the association in order to best strengthen the leadership of local public school systems. Although the responsibilities and perspectives of the two entities are different, the goal is always about educating children.

PART V: BIBLIOGRAPHY

In addition to the sources cited in this guidebook, citations for which are listed below, several resources are available for download from the State Associations section of the NSBA website (www.nsba.org). The tools and materials posted on the website are examples from state school boards associations and may be adapted for use by other NSBA members. Resources will be added and updated on an ongoing basis. For assistance accessing the online resources, please contact NSBA at info@nsba.org or 703-838-6722.

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