



# New Mexico School Boards Association

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PREPARED EXPRESSLY FOR THE  
BOARD LEADERSHIP DEVELOPMENT PROGRAM  
JUNE 3, 2021

# Sign-In Directions to Receive Credit

- In order to receive training credit for the 2021 Virtual Law Conference:
- School board members are to leave their full name (no nicknames or abbreviations) and their district in the Zoom chat box.
- You need only to sign in once during each of the four three-hour training sessions.
- If you are calling into the session, you will need to email Lorraine Vigil, Program Director [lvigil@nmsba.org](mailto:lvigil@nmsba.org) to let her know you are participating by phone with your phone number and which sessions you attended.
- She will then review her records to verify your phone number was active during the session.
- This avoids any issues of school board members not receiving their credits.





# Agenda for the Training

## Welcome & Introductions

### Frame I: Board Self-Evaluation

- Best Practices
- Sample Approaches
- Interaction in Breakout Rooms

### Frame II: Effective Board Meetings

- Best Practices
- Sample Approaches
- Interaction in Breakout Rooms

### Frame III: Putting Both Together

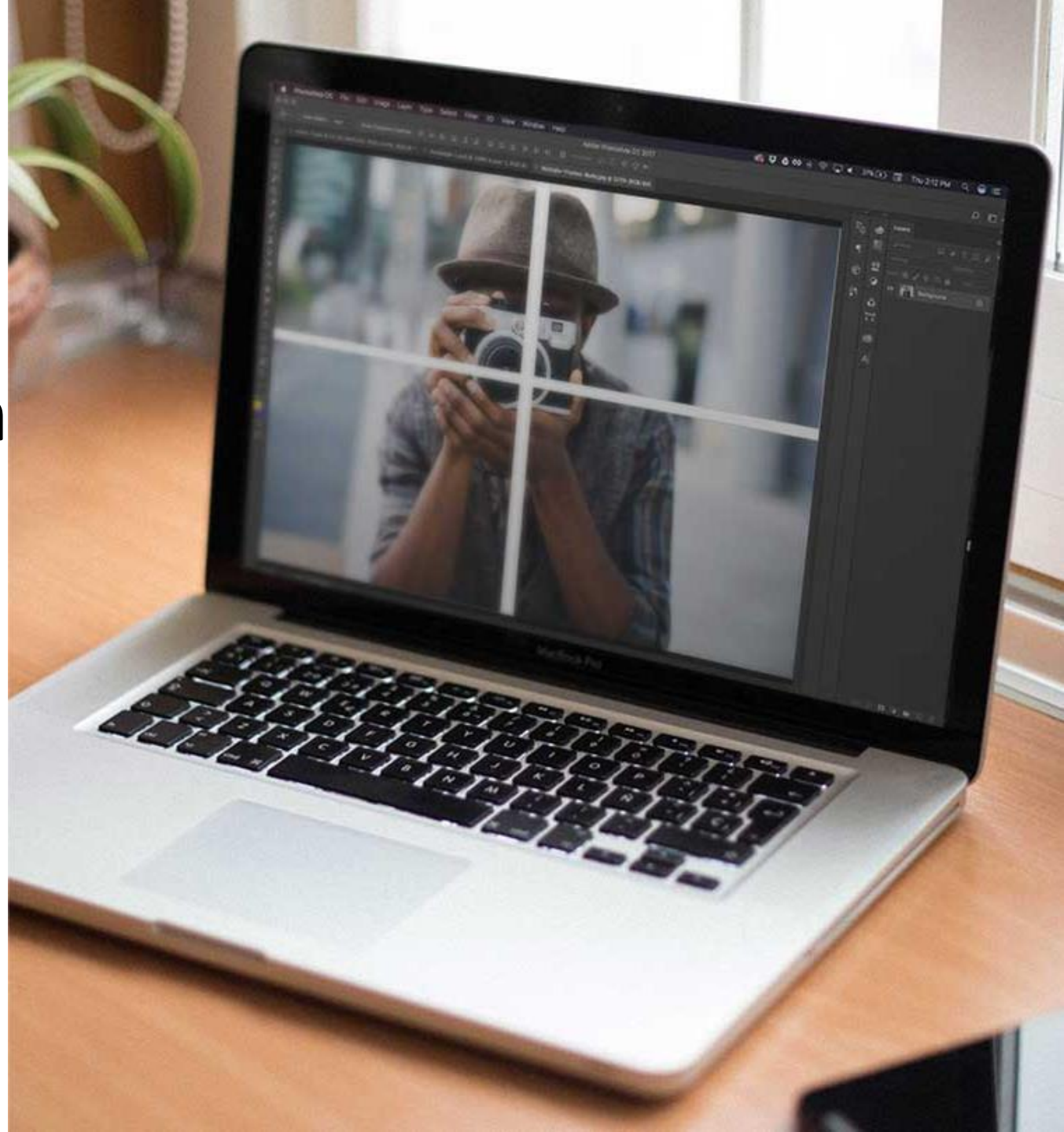
- Panel of Board Presidents and Superintendents
- Interaction in Breakout Rooms

# Frame 1

## School Board Self-Evaluation: A Best Practices Driven Approach

In this frame we will:

- Examine the rationale for self-evaluation
- Review a model employing best practices
- Get any questions you have answered
- Learn how your board can further explore self-evaluation



# Why self-evaluate?



- Holds board members accountable to themselves, the board, staff and community
- Exercises your power as a board to model positively for the district
- Improves decision making by enhancing a common understanding of philosophies and goals.
- Provides a starting point for effective goal setting and long- range board improvement planning

# National School Boards Ingredients for Board Self-Evaluation

- Constructive
- Standards (criteria) based on effective board research
- Based on goals for the board not the system
- Includes strategies for improvement
- At least once a year
- Form a composite picture
- Evaluate the board---not individuals
- All board members should be involved in the process



**IN THE NEWS**

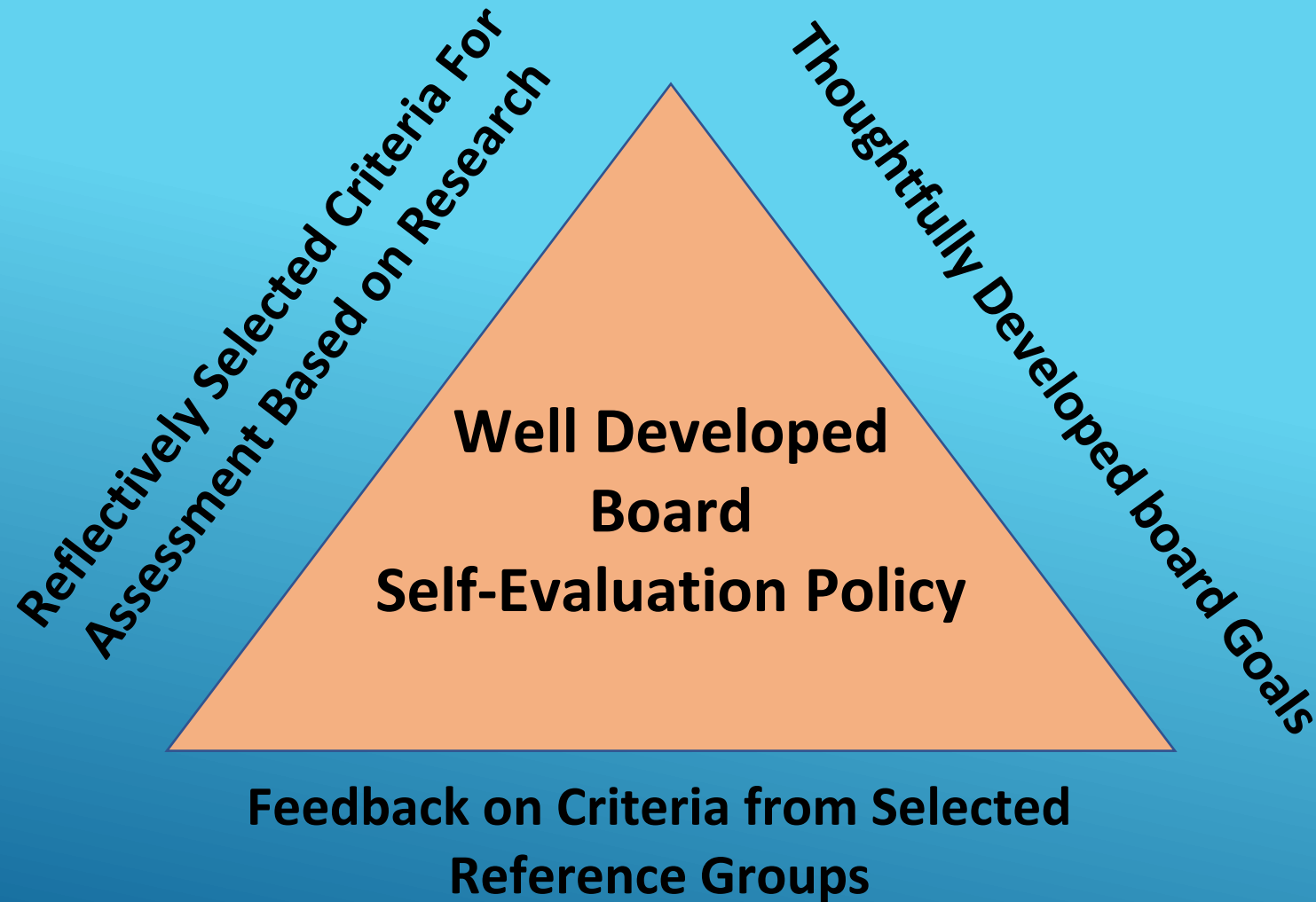
# What Represents Best Practices?



**BEST PRACTICE**

- Some form of policy driving the process
- Process is based on research related to effective boards
- Reflectively developed set of categories against which performance is assessed
- Some mechanism in the process to gather board member perceptions and share those
- Set of thoughtfully developed board goals as an outcome against which the board will hold itself accountable

# Board Self-Evaluation Model Based on Best Practices





# NMSBA Policy



## EVALUATION OF SCHOOL BOARD/

**Board SELF-EVALUATION** The board shall meet as necessary for the purpose of appraising its functioning as a board and to evaluate board performance. The appraisal plan approved by the board will be facilitated by the board President working with the Superintendent.

Evaluation instruments for board operation may be used in the process.

The Superintendent and others who regularly work with the board may be asked to participate in all or a portion of the appraisal.

Areas of board operations and relationships that may be appropriate to consider during the evaluation of board procedures may include, but are not limited to:

- Board meetings/decision-making process.
- Policy development/implementation.
- Board/District goal setting.
- Curriculum and instruction management/program.
- Fiscal management/resource allocation.
- School plant planning/management.
- Board member orientation.
- Board member development.
- Board officer performance.
- Board member relationships.
- Board-Superintendent relationship.
- Board-community relationship.
- Legislative and governmental relationships.

*Adopted:* date of manual adoption LEGAL REF.: [22-5-4 NMSA](#) CROSS REF.: [BDD](#) - board-Superintendent

# Criteria for Assessment



## 1. Working Strategically-Goal Setting and Planning

The board consistently and effectively engages in strategic planning – long-range effective planning with clearly defined goals for the district which are focused on the district's mission.

1=Almost Never

2=Sometimes

3=Frequently

4=Almost Always

# Criteria for Assessment



## 2. Board/Superintendent Relations

The board works effectively with the superintendent, makes clear the board's expectations for him/her, and holds him/her accountable for meeting those expectations through a well-designed and effectively implemented evaluation process.

1=Almost Never

2=Sometimes

3=Frequently

4=Almost Always

# Criteria for Assessment



## 3. Board Meetings

The board conducts effective meetings where each board member's perspectives are shared. Business is conducted in a professional way which inspires public confidence.

1=Almost Never

2=Sometimes

3=Frequently

4=Almost Always

# Criteria for Assessment



## 4. Financial Oversight

Board members understand the school budget, ask relevant questions on financial matters, and collectively exercise appropriate fiduciary responsibility. An effective Budget Committee and Audit committee are both in place and keep the board informed.

1=Almost Never

2=Sometimes

3=Frequently

4=Almost Always

# Criteria for Assessment



## 5. Policy and Governance

The board regularly reviews its policy manual, adopts new policies in a proactive manner, follows its policies, and holds administration and staff accountable for following those policies.

1=Almost Never

2=Sometimes

3=Frequently

4=Almost Always

# Criteria for Assessment



## 6. Board Interpersonal Qualities

Board members have developed a climate where individuals can respectfully disagree with each other, where board members demonstrate respect for one another even when opinions differ, where the trust level is high, and confidentiality is maintained.

1=Almost Never

2=Sometimes

3=Frequently

4=Almost Always

# Criteria for Assessment



## 7. Board Relations with Staff

The board creates a climate of support for the staff in the district while at the same time avoids allowing personal friendships or familial relationships to affect board decisions and/or policies.

1=Almost Never

2=Sometimes

3=Frequently

4=Almost Always



# Criteria for Assessment



## 8. Board Relations with Community

The board demonstrates respect for and cooperation with its community, represents the district positively, seeks input from the community as appropriate, and effectively communicates with the community about school issues.

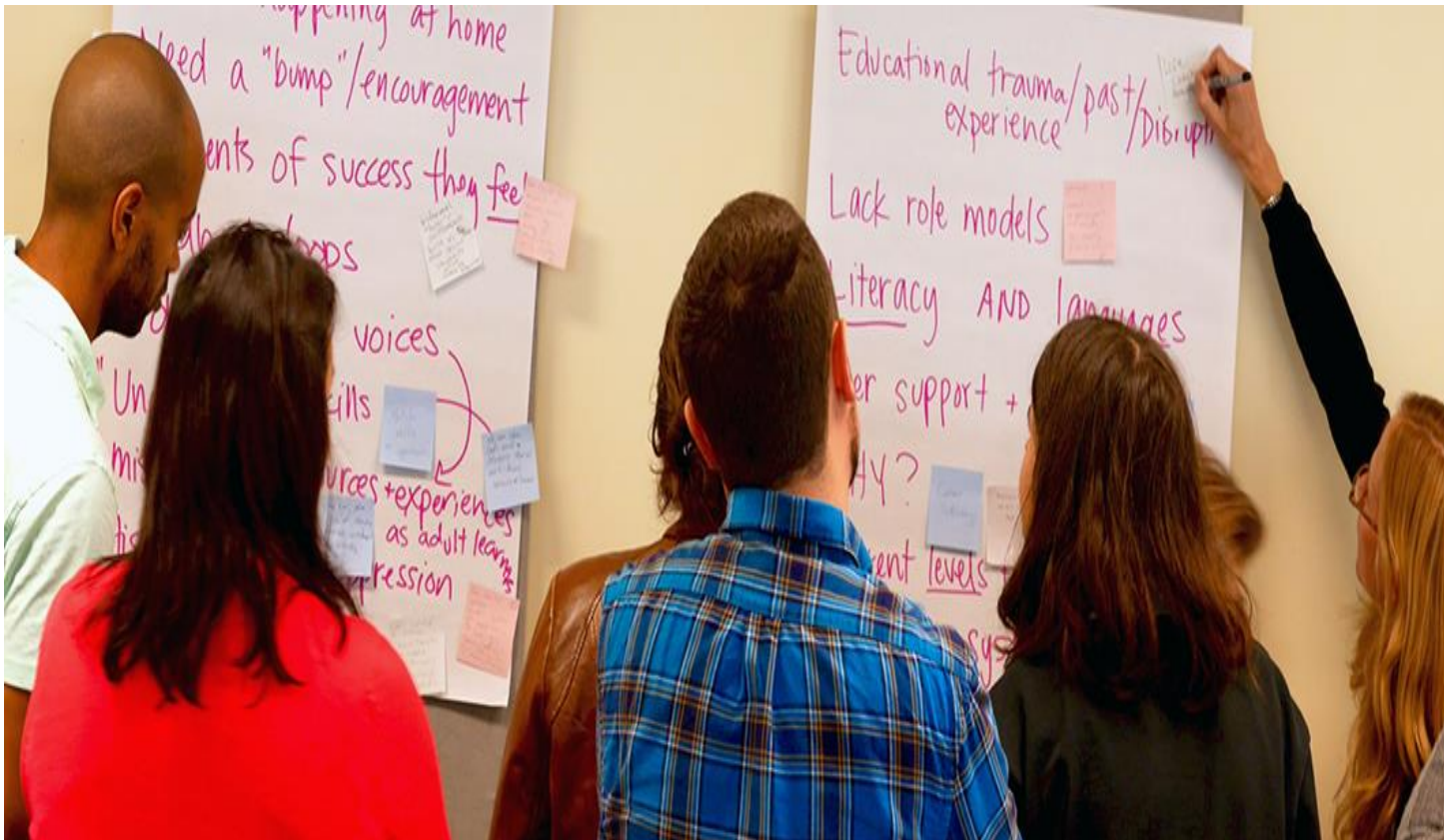
1=Almost Never

2=Sometimes

3=Frequently

4=Almost Always

# Criteria for Assessment



## 9. Board Development

The board actively participates in NMSBA regional and state meetings, attends NSBA conferences, seeks training where areas of growth are identified, and is actively seeking to improve its operation.

1=Almost Never

2=Sometimes

3=Frequently

4=Almost Always

# Board Evaluation Categories In Descending Order of Mean Response

Evaluation Criteria In Descending Order of Mean Response	Mean Response
Working Strategically-Goal Setting and Planning	
Board/Superintendent Relations	
Board Meetings	
Financial Oversight	
Policy and Governance	
Board Interpersonal Qualities	
Board Relations with Staff	
Board Relations with Community	
Board Development	
<b><i>Average for all categories</i></b>	



## Thoughtfully Developed Board Goals

### Board of Education Discussion Draft board Goals for 2021 February 4, 2021

Goal 1 : the board will conduct a work-study session prior to the end of June 2021 with district finance office personnel to review the current structure of financial reports and identify for staff requested modifications of the reporting structure which will improve the board's understanding of the district's finances.



## Thoughtfully Developed Board Goals

### Board of Education Discussion Draft board Goals for 2021 February 4, 2021

**Goal 2 :** the board will work with the superintendent to explore the creation of a "paperless" working environment for the board including communications with the superintendent, board agendas, and board policy and institute "paperless" recommendations prior to May 2021.



## Thoughtfully Developed Board Goals

### Board of Education Discussion Draft board Goals for 2021 February 4, 2021

**Goal 3** : the board will create a committee comprised of at least one board member, one administrator, one parent, and one student which will be charged with conducting a thorough review of three sections of the board policy manual and offering to the board recommended revisions in those three sections. This review shall be completed by April 2022.



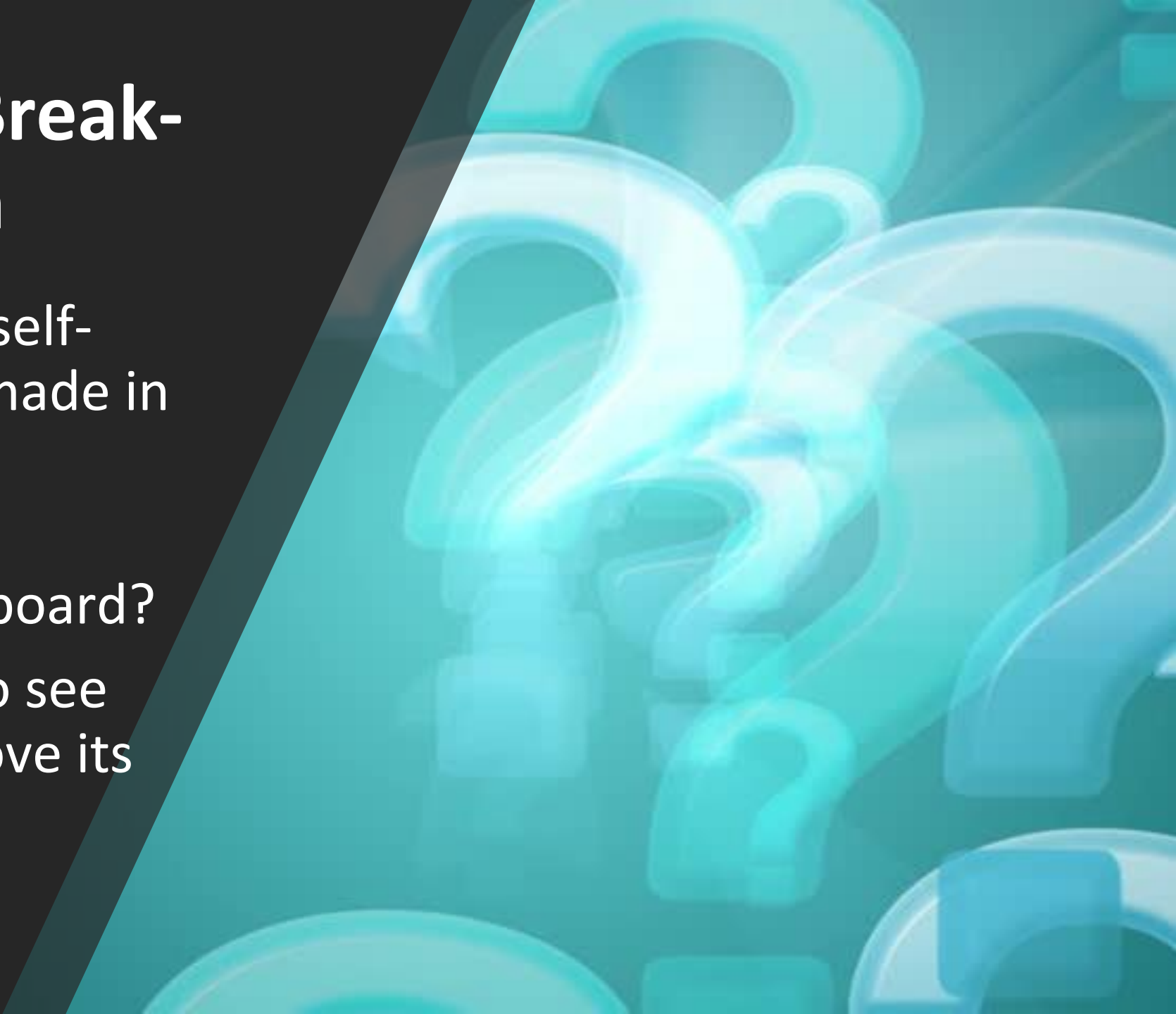
# Thoughtfully Developed Board Goals

## Board of Education Discussion Draft board Goals for 2021 February 4, 2021

Goal 4 : the board will review, revise, and approve the superintendent evaluation policy, and review and approve superintendent's goals for the 2021/2022 school year prior to the end of August, 2021.

# Questions for Break-Out Room

- ✓ What efforts at board self-evaluation have been made in your district?
- ✓ How does your board establish goals for the board?
- ✓ What would you like to see your board do to improve its performance?







## Frame 2

# School Board Meetings: A Best Practices Driven Approach

In this frame we will:

- Examine the process of conducting effective board Meetings
- Review a model employing best practices (p.p. 74-79)
- Learn how your board can further improve its meetings
- Get any questions you have answered



## Keys to Effective Board Meetings



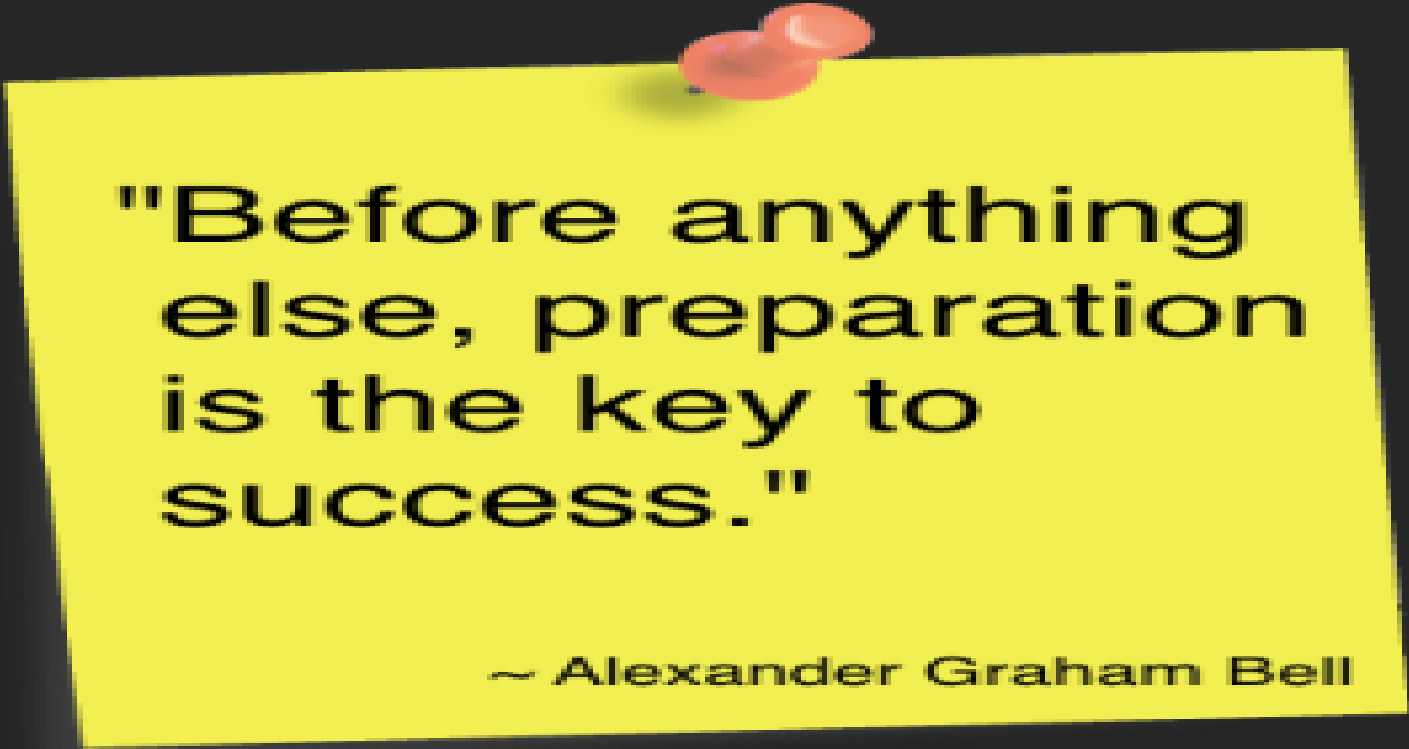
# Environment

Is the environment conducive to an effective meeting?



## Agenda Development Procedure

- •Format & Sequence
- •Keyword: Vision, Policy, Accountability, Community Leadership, Board Superintendent Relationship
- •Action Items



"Before anything else, preparation is the key to success."

~ Alexander Graham Bell

- The Board prepares by reading and reviewing their Board packet
- The staff prepares by providing information to the board and being prepared to answer questions



## Who speaks when?

- How are speakers recognized?
- When and how does the public get to speak?



## Effective Meeting Checklist

- Are new issues for the Board channeled through the agenda development procedure & not brought up for the first time at board meetings?
- Have matters to be acted upon been reviewed, studies and presented in writing to your board by the administration?



- Is the school attorney asked to attend when important legal matters are on the agenda?
- Does the superintendent specify in advance those items for which he or she has a recommendation?

## Effective Meeting Checklist





- If the Board goes into executive session, is a reason announced that is consistent with open meetings laws?
- Does the Board rate its own performance identifying strengths and areas for improvement?

## Effective Meeting Checklist

# EVALUATION

- Outstanding**
- Very Good**
- Satisfactory**
- Marginal**
- Unsatisfactory**



## Questions for Break-Out Room

- ✓ What are the best meeting practices in place in your district?
- ✓ Which of the best meeting practices discussed would most benefit your board as it is presently functioning?
- ✓ How can you personally contribute to a more effective meeting?



## **Frame 3 Putting it All Together- Board President- Superintendent Panel**

- Hear from successful leaders
- Learn how your board can further improve its meetings
- Get any questions you have answered

A close-up photograph of a hand placing a single puzzle piece into a larger assembly. The puzzle pieces are light blue and white. The hand is positioned at the top left, and the puzzle piece being placed is in the center. The background is a blurred pattern of puzzle pieces.

## Frame 3

# Putting it All Together-Board President-Superintendent Panel

In this frame we will:

- Hear from successful leaders
- Learn how your board can further improve its meetings
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For more  
information please  
refer to:

NSBA Becoming a  
Better Board  
Member-Fourth  
Edition

If you do not have a  
copy of this  
resource, please  
contact Joe Guillen.



## Questions for Break-Out Room

- ✓ What are the best meeting practices in place in your district?
- ✓ Which of the best meeting practices discussed would most benefit your board as it is presently functioning?
- ✓ How can you personally contribute to a more effective meeting?