



NEW MEXICO SCHOOL BOARDS ASSOCIATION

Board Chair Handbook

Revised 2021



New Mexico School Boards Association

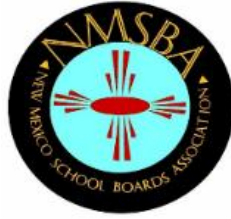
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Board Chair Handbook

Introduction

We are pleased that you are taking the time to read this Board Chair Handbook. We believe, no matter in what capacity you serve your school board, you will find the material in this manual to be of great value.

The purpose of this manual is to provide information on leadership for board chairs to answer any questions you may have. If you have other questions, please feel free to call the NMSBA office at 505-983-5041 for guidance or advice. If we don't know the answer, we will direct you to someone who will be able to help.

Special Credits

NMSBA wishes to express appreciation to the Tennessee School Boards Association for researching and allowing reproduction of much of the material in the handbook. NMSBA also expresses our sincere thanks to Cimarron School Board Member and Master Board Member Nancy Hooker for the diligent update and revisions to the Board Chair Handbook.

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The Chair as a Leader

What does it take to be chair of the board?

How much do you know about what it takes to be an effective leader of your school board? Here, adapted from many sources (including veteran school board members), is a quiz to test your knowledge of board chair responsibilities. (Answers provided at the end of the chapter)

Circle "T" if the statement is true and "F" if the statement is false.

1. A primary leadership responsibility of the chair is to emphasize cooperation and reduce conflict.

T F
2. A good chair is prepared, positive, and assertive in steering discussion and keeping it on target.

T F
3. The smart board chair is always thinking about what to say or do and not worrying about whether everyone understands what is going on.

T F
4. Being the board chair takes about the same amount of time as being a board member.

T F
5. It is not the board chair's responsibility to encourage board members to attend local, state, regional and national meetings.

T F
6. When anger arises during a school board meeting, it is up to the parliamentarian to defuse the situation.

T F
7. The board chair has the responsibility to make sure that all committee responsibilities are spelled out.

T F
8. When speaking for the board, the board chair should always let their personal opinions be known.

T F
9. It is impossible to anticipate things that may come up during a meeting, therefore there is no reason for the board chair to plan ahead.

T F
10. The board chair should give the audience an opportunity to voice their opinions on every agenda item.

T F

The Chair as a Leader

Every board member has a responsibility to make the school board effective, but the chair carries the heaviest responsibility since he was selected by peers to be their leader. Certain skills and actions simply are required if the chairman is to get the job done properly. The chairman must be able to control a meeting; to deal diplomatically with a variety of malcontents; to be articulate on school matters, especially when it comes to speaking with members of the press; and to provide leadership to a group of elected representatives who bring all sorts of expectations and agendas to school board service.

To a large extent, the board chairman sets the tone and shapes the public's perception of the school board. It is the chairman's personality that constituents most often hear and react to. And, it's the board chairman who most often is called on to referee board member disputes and serve as the peace keeper during board meetings.

Following is a listing of the duties which the school board should reasonably expect of its chairman in leading the board to achieve its maximum effectiveness.

1. Establish a tone of cooperative leadership

A primary leadership responsibility of the chair is to emphasize cooperation and reduce conflict. The board chair has the major responsibility for establishing good working relationships with the superintendent and other administrators and among school board members. The chair must have a depth of understanding about working with other people. The chair can set the tone for board member relationships by speaking of the need for cooperation and mutual respect, and by allowing for diversity of opinion.

2. Remain firmly in charge of school board meetings

A good board chair is prepared, positive, and assertive in steering discussion and keeping it on target. There is a knack in knowing when an issue needs to be thoroughly discussed and when it is time to move on. And it is important that the chair keep the discussion positive. The best board chairmen have the ability to use the power of the chair to keep the board dealing with board business rather than wandering into unproductive, political or philosophic areas. It's this power of the chair that keeps a meeting from degenerating into a circus when touchy topics are on the agenda.

By the time board members become board chairmen, they usually have spent enough time on the school board to learn parliamentary procedure; knowing when to be firm and when to be lenient about applying the procedures is the true test of knowledge and skill.

3. Remain open to suggestions

A natural temptation of a novice board chair is to keep things on an even keel to avoid the disruption that changes can cause. The best board chairmen are open to new ideas and are interested in other people's viewpoints. Although changes can be a pain, the goal is to

listen, to be fair, consistent, honest, and as straightforward as can be, wade through the suggestions, and come to a conclusion.

The chair should not necessarily do what other people suggest but should always consider their suggestion to see if it would lead toward improvement.

4. Listen

The overwhelming quality necessary for effective board leadership is to listen. People who address the board must be reassured that they have been understood. It helps for the chair to say something like, “I think I understand what you are bringing up.” Then repeat the statement. People at meetings or hearings keep saying the same thing over and over because they are not sure the board understands. When the board chair repeats things that the speaker has said it helps other board members to grasp the speaker’s idea accurately. The smart board chair listens carefully and tries to make sure everyone understands what is going on. Eye contact is an important part of good listening. It shows that the board is listening.

5. Prepare for meetings

Part of the board chair’s homework is being involved in planning the board meeting agenda and going over upcoming items with the superintendent. Also included in the chair’s take-home assignments is thorough preparation for each board meeting, including making sure all necessary background materials are made available to fellow board members. It takes twice as much homework time to be a good board chair as it does to be a prepared board member.

6. Plan for board development

It’s up to the chair to ensure that the board continuously becomes more effective. This includes encouraging board members to attend local, state, regional, and national meetings—and bring back the word to the other members of the board. It also includes planning board retreats, self-evaluations and other workshops designed especially for your board.

Workshops, meetings, and professional journals are what help keep school board members—no matter what size community they serve—open to new ideas in education. Meetings add perspective unavailable in a local community.

7. Build the board/superintendent relationship

A board chair needs to understand and to interpret for others the difference between the roles of the board and the superintendent. The board chair should make sure board members understand their proper role as policy makers who work through the superintendent. There is definitely a teaching role on the part of the board chair, especially

when new members come on board. The fine line between what is policy and what is administration makes it essential that the board chair be able to clarify such situations for the board as a whole.

Another part of the board chair's role in establishing the proper board/superintendent relationship is to foster a sense of integrity where the board and superintendent can be trusted to be forthright and honest with each other. At the very least, the board and superintendent should generally agree to praise publicly and criticize privately.

The board chair can help foster a feeling of mutual trust and respect by interpreting board action to the superintendent and vice versa. The board chair can offer the superintendent support, serve as a sounding board, give constructive criticism when needed, and help analyze individual and community reactions to district action.

8. Keep a lid on explosive situations

It's inevitable that some school board decisions, no matter how carefully deliberated, will upset some members of the community. The wise school board chair recognizes that angry reactions go with the territory. When anger arises during a school board meeting, it's up to the board chair to defuse the situation using compassionate language.

The chair must not give in to the impulse to yell, become combative or let anger show during a meeting. That never gets the job done. The chair should help board members to realize that disagreements are fine before a decision is made, but a solid front is required afterwards. Although this won't always quiet ideological opponents, it never hurts to remind everyone that destructive infighting only hurts the board--and the schools--in the long run.

9. Delegate responsibilities

Closely related to board organization is the board chair's ability to delegate. If the board has either ad hoc or standing committees, the board chair must make committee appointments. To do this, a chair must know the strengths, weaknesses, interests, and natural talents of his fellow board members and assign committee memberships and chairs in light of these qualities.

A part of making committee assignments is making sure that committee responsibilities are clearly spelled out, and that reporting procedures are clearly understood. The chair must also see to it that time for discussion of committee reports is scheduled on the board agenda. She must also guard against a committee acting for the board.

10. Build good relationships

The board chair is in an excellent position to help foster good relationships between the board and the staff, the board and the press, the board and the public, the district and other community and government organizations and among board members themselves.

The chair can encourage board recognition of staff accomplishments and two-way communications with school employees. He can ensure that members of the community feel welcome at board meetings and that they have access to the board. He can maintain communications with other community leaders and government officials, and can serve as a board spokesman to the press.

Selecting a Chair

There are various ideas about who should be chair and how frequently they should be re-appointed. Some boards regularly rotate this position among the membership. Other boards expect the most senior or longest serving member to assume the position. Still other boards have been led by a particular member for so long that it apparently doesn't occur to them that someone else should assume the position. Year after year they automatically return the same person to the chair.

Quality of leadership should be the determining factor in deciding how long a person should continue to serve as the board's chair. There should be no assurance or divine right that any individual will be elected or re-elected. Neither should tenure automatically be for one term if a person is providing satisfactory leadership. A school board that has a good chair should keep him as long as he is willing to serve. School boards should not play "musical chairs" with the board chair. The practice of taking turns or using longevity to determine the board's chair is a sad commentary on the board's respect for leadership.

Some chairmen would lead you to believe that the experience of being a board chair is mostly bad. As one said, "Everybody on the board should have to be chairmen at least once. Everyone should have their share of the ulcers."

Another chair said, "One would assume that being a school board chair is a great chance to be in the community limelight. Unfortunately, when the "light" is on you, all it generally does is give the critics a target which is easier to hit."

The board chair's post isn't for everyone, but there are benefits. People who have been the chair of a school board say they liked it for the opportunity it gave them.

Board chairmen also find satisfaction in being known as the leader of the board. Being board chair carries a certain clout with other community leaders. For people who enjoy responsibility, the board chair is considered a prime position to hold.

Advice for the Chair

- 1) When speaking for the board, you must subordinate your personal views and represent those of the collective board.
- 2) You must be adept at communicating with the news media. Because the majority of the public does not attend school board meetings, most people rely on news media coverage of the school board meetings for their information. The extent and quality of that coverage can be greatly improved by the chair who properly, openly, candidly, and honestly deals with the media.

- 3) Avoid playing one member or group against another. At times it may be tempting to do so to pursue a particular goal. On certain issues where there is a divided board and strong feelings, it is difficult to rise above these differences and reach a majority conclusion.
- 4) Lead the board but don't be so far ahead of the other board members or constituents as to appear to abandon them or their interests. The chair personifies the board. If you are good, the board will be viewed as good. If you are weak or ineffective, the public will view the board in that light.

A Board Should Expect Its Chair To:

- Serve as a model for the rest of the board. You can't expect others to behave better than the chair.
- Keep other board members informed about special issues and problems, and insist they keep you informed about their concerns.
- Direct everything possible through proper channels, and avoid taking on any matter until you consult your policy covering that issue.
- Know the difference between policy and administrative procedures and help the rest of the board make this distinction.
- Preside over meetings with dignity and fairness. Use proper parliamentary procedure.
- Keep meetings moving to prevent board members from becoming sidetracked on an extraneous issue. Give board members and when appropriate, the audience a chance to voice opinions, but keep those statements limited to the subject being discussed. Keep the attention of the board on one matter at a time.
- Know when board members are ready to act on a matter and when they need more time to debate. Bring each issue to closure.
- When you call for a vote, state the issue you are voting on immediately beforehand to make sure there's no chance of confusion.
- Announce results of all votes.
- Declare discussion out of order when necessary. Especially, shield board members, administrators, and teachers from personal attacks at meetings by quickly calling persons attempting to make such attacks out of order.
- Remember, board members are the only members of the school community legally empowered to make school policy decisions. Resist attempts from outside groups to usurp that power.
- Encourage your superintendent to come to you with any problems he might have. Neither he nor you should wait to address problems until they come up at public meetings.
- Call for the superintendent's recommendation on every action item on the agenda.
- Promote continuous development of the board and its members.
- Ensure that the board uses its time wisely and focuses its attention on appropriate governance issues—planning, policy and promotion.
- Control the involvement of non-board members in meetings.
- Seek to eliminate inappropriate action by board members or the superintendent relative to board matters.
- Attempt to harmonize divergent board member views.

Before, During and After the Meeting

Before the meeting

- Review the meeting agenda with the superintendent.
- Discuss who will handle various agenda items, and how they will be handled.
- Try to anticipate things that might come up during the meeting and how they will be handled.

During the meeting

- Run it! You are communicating an important public message by being in charge of the meeting..
- Ensure opportunities for other board members to participate, give their reactions, ask their questions.
- Ask the superintendent to provide information or technical expertise.
- Be courteous and responsive to your public. Provide opportunity in the meeting for public comment. Be sure those in the audience can see members of the board and hear the discussion.
- Keep things moving and on track.

After the meeting

- Evaluate how well the meeting went. Talk it over with your superintendent or other board members. Focus on specific things that helped or hindered the meeting progress.
- Review the minutes of the meeting. Is there a record of the board actions?

Answers to the Quiz

	Answer	More Information
1	T	1. Establish a tone of cooperative leadership
2	T	2. Remain firmly in charge of school board meetings
3	F	4. Listen
4	F	5. Prepare for meetings
5	F	6. Plan for board development
6	F	8. Keep a lid on explosive situations
7	T	9. Delegate responsibilities
8	F	Advice for the Chair
9	F	Before, During and After the Meeting
10	F	Before, During and After the Meeting

Parliamentary Procedure

Parliamentary Procedure Quiz

- | | | |
|---|----------|----------|
| 1. All motions require a second. | T | F |
| 2. A unanimous vote is the same as consensus. | T | F |
| 3. The chair's decision may be overruled with a majority vote. | T | F |
| 4. Once a motion is tabled, it is dead. | T | F |
| 5. A motion would be passed if the vote was as follows:
Aye – 3 Nay – 2 Not Voting – 2 | T | F |
| 6. The board chair only votes in case of a tie. | T | F |
| 7. An item may not be discussed until a motion is on the floor. | T | F |
| 8. A motion to reconsider is the same as a motion to rescind. | T | F |
| 9. A motion to adjourn is not debatable. | T | F |
| 10. On important questions before the board, the chair may not limit the length of discussion on a motion. | T | F |
| 11. Explanations are always necessary when the chair rules a motion out of order. | T | F |
| 12. The chairperson cannot enter into debate on an issue unless they yield the chair to the vice-chair. | T | F |
| 13. A motion to adjourn need not wait until the agenda has been completed. | T | F |
| 14. A school board has the authority to adopt a set of Rules of Order as board policy. | T | F |
| 15. Each member of the school board (even those who usually don't speak up) should be allowed to speak on any individual issue under debate. The chair may refuse to call upon other board members for second comments until each member has had a chance to speak at least once. | T | F |

Rules of Order

Any deliberative body must adopt some rules of order that determine such matters as what will be discussed and who may have the floor. The rules of order most commonly adopted by school boards and many other deliberative bodies in western societies are minor variations of H. M. Robert's Rules of Order. These rules are often also called parliamentary procedure because they derive from the rules governing debate in Great Britain's Parliament. The underlying purpose of adopting rules of order is to assure that every member has reasonable opportunity to participate in the deliberation and that deliberation is effective and efficient—even when the topics of deliberation may be intense.

A school board normally adopts a set of rules of order as board policy, so please review your district's policy manual. The value of having such rules becomes most obvious during discussions when people disagree or are intolerant of each other's viewpoints. The rules provide for someone (the board's chair) to chair the discussion in a manner that permits all members' views to be heard. Typically, such a discussion must assure that only one person speaks at a time, that procedures prevent one person – or only persons on one side of an issue—from monopolizing discussion, and that both positive and negative votes are counted. The chair of the discussion is also responsible for keeping the discussion from wandering to other topics or becoming ad hominem (attacks on the personality or motives of other speakers rather than discussion of issues).

Some boards may become bogged down in conflicts over parliamentary procedures such as the proper form of a motion or what matters take precedence in a debate. On the one hand, careful attention to rules of order should help deliberations move forward in a constructive way and keep everyone focused on the topic of discussion. On the other hand, bickering over procedural issues can become a method of obstruction, by a frustrated or unhappy board member. When conflict over parliamentary procedure begins to dominate board meetings, firm and tactful intervention by the board's chair may be needed to resolve any underlying issues.

Purpose

Most organizations operate under their own bylaws which are designed to deal with most substantive issues they face. Most follow a standard set of rules to handle the procedural questions. Following a uniform set of rules permits democratic disposition of discussion, giving everyone who wishes to speak an opportunity to express an opinion or raise a question with minimal delay and confusion.

Most rules of order are designed for large formal bodies such as the U.S. Congress or the British Parliament. School boards with three to fifteen members rarely need to follow the rigid form of the larger group, but those who are charged with leading the sessions would do well to know the basic principles needed to take the board beyond locally adopted operating rules.

Basic Principles

The rules under which your board operates should be clearly stated and formally adopted, including a reference to an external set of guidelines, such as the most recent edition of *Robert's Rules of Order*, as the resource to be used when unusual questions arise.

Parliamentary procedures do not have the force of law. They do not bind anyone or any group unless the group adopts the procedure. However, once adopted they must be followed until rescinded.

Parliamentary procedure is a logical process designed to aid group deliberation in a democratic society. When it becomes cumbersome, it should be changed. To be most effective, it must make sense to those who must use it.

To assure open discussion, one must understand when a motion is debatable or not debatable, amendable, or whether a speaker may or may not be interrupted. The ground rules and methods must be generally understood or the result is likely to be chaos and extremely long meetings.

While the accepted principle allows the majority to make decisions, the rights of the minority are protected in major issues calling for two-thirds approval, such as in constitutional changes or debate closure.

The chair should strongly encourage all board members to vote on all issues in which they do not have a conflict of interest. Board members are elected to make decisions regardless of how difficult the decision may be. Those who abstain from voting are in effect voting with the prevailing side.

The chair (without relinquishing the chair) may enter discussion, make and second motions, and vote.

Running the Meeting

Every meeting should follow an order of business and an agenda, which is usually prepared by the superintendent in consultation with the board chair. Each member of the board should have copies in advance of the meeting, including any background material. The chair of the board calls the meeting to order. Usually, the first item of business is the adoption of the agenda.

Types of Motions

All motions are designed to help in handling a main motion. A main motion is simply defined as one which brings business before the board for action. It may not conflict with local, state, or national law, or with the bylaws or policy of the board.

Rules of parliamentary procedure do not supersede state statutes.

- [Click here for a PDF entitled Preside Like a Pro](#)

The Main Motion

A main motion is made, seconded, and then stated by the chair. No other business may be discussed until that has been disposed of in some fashion. Small boards may wish to dispense with a second, or even allow discussion of an issue without a motion. However, no action should be taken without a duly made motion which can be recorded in the minutes. Each motion should deal with one point and, whenever possible, should be stated in a positive manner. By stating motions in a positive manner, the intent of the board is made clear. For example, if the motion is “to build a new school” and the vote ends in a tie, then clearly the motion has failed. However, if the motion is stated “not to build a new school” and the vote ends in a tie, it would be consuming as to what action the board has taken. The main motion is debatable and is adopted by majority vote.

Subsidiary Motions

Main motions may be amended. Words can be added or deleted or whole sentences or paragraphs may be inserted. For example: The main motion may be that, “The Everytown School Board will permit duly recognized community groups to use the district buildings for meetings and public events.” An amendment may insert the word “non-profit” before community. The amendment is debatable, requiring majority approval. Then the amended motion must be considered.

The maker should state the amendment clearly, indicating what changes are to be made, and by what method, and the chair should repeat the amendments. If a long discussion follows, the motion, with its amendment, should be reread before the vote is taken.

The amendment may be amended after it has been approved by the same process, but that action must take place before the main motion is adopted. Only one amendment to a main motion or to amend an amendment may be made at any one time.

The main motion, with or without amendments, may be referred to a committee or to staff for study. The committee or staff must report at the time specified in the motion to refer. The motion which is debatable and amendable, must be accepted by a simple majority.

A motion to postpone to some future date may be introduced at a time no one is speaking. It is debatable and the time suggested may be amended.

A motion may also be laid on the table, or tabled. It may be taken from the table when new conditions arise, new information is received, or whenever no other matter is before the body. These motions may not be debated or amended. They require majority vote. Tabling motions should not be used intentionally to kill a motion, although that is often the effect.

A motion may be reconsidered, whether carried or lost, either at the same or next meeting. The mover must have voted with the prevailing side. The motion is debatable and requires a majority. The motion being reconsidered must be handled as the next order of business.

- To close debate on a pending question requires a motion which is not debatable or amendable and needs a two-thirds vote. It should only be used when debate has been prolonged. The issue being debated must be voted upon immediately.

- Motions may also be made to limit the length of time an issue may be discussed. These may be amended, but not debated, and also require a two-thirds vote.

During discussion of any motion, one may raise a point of order. It can be done at any time, but only to question a ruling of the chair or a point of parliamentary procedure.

The chair's decision may be overruled with a majority vote.

- A member may ask a "question of privilege."
- A motion to adjourn is almost always in order. The exceptions are: when a speaker has the floor, when a vote is being taken, after a similar motion has been turned down, and when the business at hand cannot be concluded quickly.
- The motion to adjourn is not debatable.

There are many other motions that may be used in complex deliberations. Most of them are used with larger groups and in involved discussions. School Board should be able to operate with a degree of informality that eliminates the need for the detailed structure that is required and is used with larger bodies.

A good, complete parliamentary guide should be kept on hand at each meeting to answer more complex questions that may arise. The following PDF documents from JimSlaughter.com (used by permission) may prove helpful:

- [Click here for a chart of Motion Precedence](#)
- [Click here for a Parliamentary Motions Guide](#)

Parliamentary Procedure in Small Boards

In a board meeting where there are not more than about a dozen members, some of the formality that is necessary in a large assembly would hinder business. The rules governing such meetings are different from the rules that hold in other assemblies, in the following respects:

- Members are not required to obtain the floor before making motions or speaking.
- There is no limit to the number of times a member can speak to a question, and motions to close or limit debate generally would not be entertained.
- Informal discussion of a subject is permitted while no motion is pending.
- The chair can speak in discussion of a motion and, subject to rule or custom within the particular board, he/she usually can make motions and vote on all questions.

A Minute on Minutes

If your board tends to regard the approval of minutes as an irrelevant chore, please reconsider. Your board's minutes are the main channel of communication from the board to school personnel and the public. They also are the only legal record of your meetings. As one school attorney said, "Minutes may have the force of law and should be treated as if they will someday appear in court... It's quite possible that they may."

In New Mexico, the Open Meetings Act requires written minutes of all school board meetings. The minutes shall include at a minimum the date, time and place of the meeting, the names of

members in attendance and those absent, the substance of the proposals considered and a record of any decisions and votes taken that show how each member voted. Draft minutes shall be prepared within ten working days after the meeting and shall be approved, amended or disapproved at the next meeting where a quorum is present. ¹

In your district, the board clerk, secretary or superintendent may be responsible for recording the proceedings. Your board may find it wise to employ trained secretarial help to keep the minutes, so that all of those involved in board deliberations can give their full attention to the business at hand.

When taking the minutes, the secretary should sit where every word can be heard. If the recorder doesn't hear or understand something, he should ask the president to have it repeated, this will simplify note taking. The board secretary or clerk should read them carefully. The official copy should be signed by the appropriate officers in your policy, such as the chair and the secretary.

The kind of minutes that will be the easiest to read and to glean information from will be those that summarize the meeting, and record important matters in an easily-discernable way.

Is It Chair or Chairman or Chairperson?

Well, that's a great question. The 20th convention of the National Association of Parliamentarians passed a resolution that it was always Chairman in 1975. In 2017, at their 41st convention, they rescinded that resolution. ²

In Robert's Rules of Order, 11th Edition, the following is the guidance:

58. Chairman or President. *The presiding officer, when no special title has been assigned him, is ordinarily called the Chairman, or the President, or, especially in religious assemblies, the Moderator. In organized societies the constitution always prescribes his title, that of President being most common. In debate he is referred to by his official title and is addressed by prefixing Mr. or Madam, as the case may be, to that title. In referring to himself he should never use the personal pronoun; he generally says, "the chair," which means the presiding officer of the assembly, regardless of whether his position is permanent or temporary. If his position is only temporary he is called the chairman.* ³

So, what to do? Many boards use the term President, which is gender-neutral. Use common courtesy and common sense and follow your local traditions.

¹ Open Meetings Act Compliance Guide 2015 Section 10-15-1 G

² <https://www.parliamentarians.org/chairperson-resolution/>

³³³ <https://robertsrules.org/rror-10.htm#58>

Parliamentary Procedure Quiz Answers

1. FALSE Motions to accept committee recommendations and nominations do not require a second unless otherwise noted in your district's policy
2. FALSE Unanimity is when everyone agrees and consensus is when no one disagrees. Although this seems like a hair-splittingly small distinction, the difference between the two can be huge in practice. ⁴
3. TRUE
4. FALSE It doesn't kill the motion because the motion can be removed from the table.
5. FALSE The chairman has the right to vote and to make and second motions. If the chairman does not vote, constituents represented by that person could feel disenfranchised since a vote was not cast for them.
6. FALSE Generally, for boards with less than a dozen members, the procedures observed are that of committees rather than a large society or assembly. Committee rules are more informal. For example, the chairman can be much more open in discussing a question, members do not have to rise to make a motion nor to wait for recognition before speaking.
7. FALSE A motion to rescind is not in order when the subject can be reached by reconsideration.
8. TRUE
9. FALSE The chair should use discretion in the importance of the issue.
10. FALSE While it is not required, out of courtesy it is desirable for the chairman to explain why the action is out of order and when such action would be in order.
11. FALSE Discretion on the part of the chair must be exercised to not abuse her/his privilege to speak on all issues. As the facilitator of discussions, the chair must involve all members in a balanced discussion.
12. TRUE

⁴ <http://gri-bloggen.se/what-is-consensus/>

The Board's Agenda

The Value of an Agenda

A well-planned agenda helps board members prepare for effective discussions and decisions. It assures that the concerns of board members, staff and community will be given appropriate consideration. It helps make it possible to conduct the meeting in an orderly, efficient and fair manner with a minimum of confusion, misunderstanding, dissention that could result from inadequate preparation. It is an avenue for communicating to the board, staff and community important matters to be discussed and actions to be taken. It is an important record—for preparing the minutes, planning future meetings and even for legal purposes. The superintendent and board chair, together, plan the agenda.

- For board members, the agenda identifies items and issues to be discussed and for which advance study may be advisable.
- For the public, it calls attention to matters in which an individual may be especially interested.
- For the staff, it indicates what supporting materials may be needed to assure that the board will have the information necessary to reach the right decision.
- For the board chair, the agenda provides the guidelines necessary for conducting the meeting in an efficient, well-organized manner.
- For legal purposes, the agenda is kept on file and can be cited as the record of what transpired, also serving as the basis for preparation of the minutes.
- For the superintendent, as the chief administrative officer and advisor to the board, the agenda provides the means for assuring that items and matters to be reported and acted upon will be brought to the board's attention.

The agenda serves as the steering mechanism for any meeting. It enables logical organization and preparation. The agenda is a tool for the meeting leader to guide the meeting. It also gives those who will participate a means for preparation.

Steps in Preparing an Agenda

- Determine the ultimate goal(s) of the meeting and the steps to get there.
- Break down the generalized topics in the agenda into specific discussion items to promote logical meeting thought and better control of this flow.
- Organize multiple topics that so related subjects are discussed in order. Be sure to indicate discussion and action items.
- When appropriate, prepare specific, pre-drafted motions and resolutions.

Distribution of the Agenda

The New Mexico Open Meetings Act requires that agenda be available to the public and posted on the district's website at least 72 hours before a meeting. If the board ordinarily meets more often than once a week, a draft agenda must be posted at least 72 hours in advance and a final agenda at least 36 hours prior to the meeting.⁵

⁵ Open Meetings Act Compliance Guide 2015 Section 10-15-1 F

Generally, board members receive the agenda and other relevant information at least five days in advance of the board meeting.

Order of the Agenda

The early part of a meeting may be livelier and more creative than the end of it, so if an item needs mental energy, bright ideas and clear heads, it may be better to put it high up on the list. Equally, if there is one item of great interest and concern to everyone, it may be a good idea to hold it back for a while and get some other useful work done first. Then the key item can be introduced to carry the meeting over the attention lag that may set in after the first 15-20 minutes of the meeting.

Some items unite the meeting in a common front while others divide the members. The chair may want to start with unity before entering into division, or vice versa. The point is to be aware that you have a choice and to make it consciously, because it could impact the atmosphere of the meeting. It is almost always a good idea to find a unifying item with which to end the meeting.

Timed Agenda

A common fault is to dwell too long on trivial but urgent items, to the exclusion of subjects of fundamental importance whose significance is long-term rather than immediate. This can be remedied by putting on the agenda the time at which discussion of the issue will begin—and by sticking to it.

Very few meetings achieve anything of value after two hours. It may be a good idea to put the time of adjournment for a meeting on the agenda as well as the starting time.

Approval of the Agenda

One of the first items to be addressed at a school board meeting should be the approval of the agenda. Not only does it allow for removal of items on the agenda, it allows for rearranging items. Adding agenda items must be done in compliance with the Open Meetings Act. You may be able to add an item for discussion, but likely no action can be taken if the item was not posted 72 hours ahead of the meeting.

Consent Agenda

To expedite business at a school board meeting, the board may choose to use a consent agenda. Use of a consent agenda saves the board time in ratifying administrative, routine or non-controversial items. When a consent agenda is used, the regular agenda for the school board meeting includes an item: consent agenda. The board chair and superintendent will decide which items should be identified as consent agenda items.

If a consent agenda is used, the chairman when presenting the agenda, should ask if any member of the board wishes to remove any item from the consent agenda so that it might be discussed. If so, the item is taken from the consent agenda and is appropriately placed on the

regular agenda or removed from the agenda entirely, depending upon the request of the board member and the board's agreement.

While the basic purpose of the consent agenda is a more efficient use of school board time, it should be recognized by board members that the use of a consent agenda will still require staff time. It is also understood that the administration recommends approval of all consent agenda items. If the consent agenda is used, the items on that agenda are approved by a single motion stated as follows: "I move to approve the items listed on the consent agenda." If the motion receives a second, the chairman takes the vote on the single motion. The minutes of the school board meeting should include the approved motion as stated and list all the items which were approved as part of the consent agenda.

Three Rules for Consent Agendas

The following rules apply for consent agendas:

1. All background materials needed for action are received by board members sufficiently ahead of the meeting to provide time for study.
2. Any school board member may request to remove an item from the consent agenda for separate action simply by requesting that it be removed. No motion is necessary. However, a motion would be in order if the member wishes to delete the items entirely from the agenda or to determine where on the regular agenda the item is to be placed.
3. The consent agenda is adopted with one motion without discussion or debate.

What Should Be Included?

The basic purpose of a consent agenda is a more efficient use of time. The superintendent should recommend approval on all consent items. State law may require that some items receive separate attention. Examples of possible consent agenda items:

- Approval of minutes
- Approval of monthly financial reports
- Changes of staff assignments
- Non-renewal of supplemental contracts

Annual Agenda

In planning the agenda, the chair and superintendent should look first at the annual planning calendar to avoid forgetting any agenda topics that occur on an annual basis. The annual calendar should include board actions required by law such as approval of the budget or issuance of non-renewal notices to certificated staff. Last month's agenda should also be reviewed and checked for any old business that the board must resolve.

Developing an Annual Agenda:

1. List each meeting scheduled for the year.
2. Schedule responsibilities to meet legal deadlines.
3. Schedule actions required by board policy.
4. Add considerations of planning activities.

Getting on the Agenda

Every school board should have a policy which sets out procedures and conditions for persons who wish to appear before the board of education. Usually, boards require that the request to appear before the board be received in time to be included on the agenda which is distributed to the board at least three days before the meeting. In developing its policy, the board should consider that only members of the board have a right to speak at board meetings. Board meetings are public meetings but not meetings of the public.

Your board policy should include a policy regarding the public addressing the board at meetings. There is a policy included with the NMSBA Policy Service.

Another prerequisite to getting on the agenda is usually that a person exhaust administrative remedies before bringing the problem to the board. A board should not allow a person to use a board meeting as a forum to complain about a problem until administrators have had a chance to solve the problem.

Boards should consider the following questions during the development of a policy regarding placement on the agenda.

- May any board member submit an item for inclusion? If so, how? Are there timelines?
- May any member of the public submit an item for inclusion? If so, how? Are there timelines?
- Who are the key people involved in structuring the agenda?
- Who is responsible for collecting all the information, suggestions and requests and actually preparing the agenda?
- Are annual agenda items reviewed to ensure annual events are not overlooked?

Distribution of the Agenda

School board policy should address the issue of how, when and to whom the agenda will be distributed. The New Mexico Open Meetings Act also speaks to the distribution of the agenda and must be followed. Other questions which a board should consider as it develops policy include:

- How many days before the meeting do board members receive copies of the printed agenda and enclosures?
- Is a list of all enclosures provided for cross-reference?
- Are advance copies of the agenda provided to the public and the media?
- How are agenda items delivered to board members?

School Board Agenda

Evaluate your own school board and then check the appropriate columns on the right to indicate that your board does/doesn't do this.

	YES	NO
Are board agendas developed from information provided by both board members and administrative staff?		
Are agendas made available to board members, staff and public at least a few days prior to board meetings?		
Are agendas sent to board members accompanied by sufficient background information?		
Are visitors provided with copies of the agenda?		
Do board members study agendas, supporting materials, minutes, financial statements, bills, etc. prior to board meetings?		
Is the agenda followed as closely as possible with non-agenda items (non- emergency) presented for discussion or listed on agenda for future meetings?		
Is the public invited to speak on agenda items before action is taken by the board?		
Is the superintendent invited to speak on agenda items and make recommendations before action is taken by the board?		
Has the board adopted or does it follow written procedures for the orderly conduct of business?		
Is the agenda arranged so that high interest/important decision items come early in the meeting and routine items are deferred to the end of the meeting?		
Does the agenda clearly spell out which items require action by the board and which are for discussion only?		
Does the agenda allow time for the public to comment about items other than those on the agenda?		
Does the board use a consistent agenda to expedite the routine items of business?		

Meeting Management

Why have a meeting anyway?

Many meetings waste a great deal of everyone's time and seem to be held for historical rather than practical reasons. Many long board meetings are little more than memorials to problems. A board meeting together can often produce better ideas, plans, and decisions than can an individual or number of individuals, each working alone. The meeting can, of course, also produce worse outputs or none at all, if it is a bad meeting.

However, when the combined experience, knowledge, judgment, authority, and imagination of school board members are brought to bear on issues, a great many plans and decisions are improved and sometimes transformed. An original idea the superintendent proposes can be tested, amplified, refined and shaped by argument and discussion, until it satisfies far more requirements and overcomes many more objections than it could in its original form.

1. A meeting helps every individual understand the collective aim of the board and the way in which the board and staff's work can contribute to success.
2. A meeting creates in each board member a commitment to the decisions the board makes and the objectives it pursues. Once something has been decided, even if a board member originally argued against it, membership on the board entails an obligation to accept the decision. The alternative is to leave the board, but in practice this is very rarely a dilemma of significance. For most people on most issues, it is enough to know that their views were heard and considered. They may regret that they were not followed, but they accept the outcome.

Just as the decision of any team is binding on all the members, so the decisions of a school board carry a greater authority than a decision by a superintendent. It is much harder to challenge a decision of the board than of the superintendent acting on his own. The decision-making authority of a meeting is of special importance for policies and procedures.

Before the Meeting

The most important question the board should ask is "What is this meeting intended to achieve?" It may be asked in different ways—"What would be the likely consequences of not holding it?" or "When it is over, how shall I judge whether it was a success or a failure?" unless you have a very clear requirement from the meeting, there is a grave danger that it will be a waste of everyone's time.

Background Materials

The practice of circulating background papers along with the agenda and minutes is a good one. It not only saves time, but it also helps in formulating useful questions and consideration in advance. But the whole idea is sabotaged once the papers get too long. They should be brief or provide a short summary.

It is folly to bring a group of people together to read several pages of closely-printed sheets at a board meeting. The exception is financial and statistical papers which have a function to support and illustrate verbal points as reference documents.

All items should be thought of and through in advance if they are to be discussed. Listing “other business” on the agenda is an invitation to waste time. Based on the Open Meeting Act, no action may be taken on an agenda item that is not posted on the meeting agenda 72 hours prior to the meeting.

The Chair’s Job

The appointment as board chair affects people in different ways. Some seize the opportunity to impose their will on a group that they see themselves licensed to dominate. Their chairmanship is a harangue, interspersed with demands for group agreement.

Others are more like scoutmasters, for whom the collective activity of the group is satisfaction enough, with no need for individual achievement. Their chairmanship is more like the endless stoking and fueling of a campfire that is not cooking anything.

And there are the insecure or lazy chairs who look to the meeting for reassurance and support in their ineffectiveness and inactivity, so that they can spread the responsibility for their indecisiveness among the whole group. They seize on every expression of disagreement or doubt as a justification for avoiding decision or action.

But even the large majority who do not go to those extremes still feel a certain stroking of the ego when they take their place at the table for the first time. It is the chair’s first duty to be aware of the temptation of self-indulgence and of the dangers of yielding to it. The clearest of the danger signals is hearing himself talking a lot during a discussion.

The best chairs make it a rule to restrict interventions to a single sentence, or a most two. A good chair limits herself never to contribute a paragraph to a meeting she is chairing. It is a harsh rule, but other members of the board will think it is a good one.

There is, in fact, only one legitimate source of pleasure in chairmanship, and that is pleasure in the achievements of the meeting—and to be legitimate, it must be shared by all those present. Meetings are useful only if they lead to some accomplishment. If the chair is to make sure that the meeting achieves valuable objectives, she will be more effective seeing himself as the servant of the group rather than its master. Her role then becomes that of assisting the group toward the best decision in the most efficient manner possible’ to interpret and clarify; to move the discussion forward; and to bring it to a resolution that everyone understands and accepts as being the will of the meeting, even if each individual does not necessarily agree with it.

His source of authority with the members is the strength of his perceived commitment to their combined objective and his skill and efficiency in helping and guiding them to their achievement. Control and discipline then become not the act of imposing his will on the group

but of imposing the group's will on any individual who is in danger of diverting or delaying the progress of the discussion and so from realizing the objective.

Once the members realize that the chair is impelled by her commitment to their common objective, it does not take great force of personality for him to control the meeting. Indeed, a sense of urgency and a clear desire to reach the best conclusion as quickly as possible are a much more effective disciplinary instrument than a big gavel. The effective chair can hold the discussion to the point by indicating that there is no time to pursue a particular idea now, that there is no time for long speeches, that the group has to get through this item and on to the next one, rather than by resorting to pulling rank.

There are many polite ways the chairman can indicate a slight impatience even when someone else is speaking—by leaning forward, fixing his eyes on the speaker, tensing his muscles, raising his eyebrows, or nodding briefly to show the point is taken. And when replying or commenting, the chair can indicate by the speed, brevity, and finality of his intonation that “we have to move on.” Conversely, he can reward the sort of contribution he is seeking by the opposite expressions and intonations, showing that there is plenty of time for that sort of idea, and encouraging the speaker to develop the point.

After a few meetings, all present readily understand this nonverbal language. It is the chair's chief instrument of educating the group into the general type of “meeting behavior” that she is looking for. She is still the servant of the group, but like a hired mountain guide, she is the one who knows the destination, the route, the weather signs, and the time the journey will take. So if she suggests that the members walk a bit faster, they take her advice.

Just as the driver of a car has two tasks, to follow his route and to manage his vehicle, the chair's job can be divided into two corresponding tasks, dealing with the subject and dealing with the people.

Dealing with the Subject

The essence of this task is to follow the structure of discussion as just described in the previous section. This, in turn, entails listening carefully and keeping the meeting pointed toward the objective.

At the start of the discussion of any item, the chair should make it clear where the meeting should try to get by the end. Are the members hoping to make a clear decision or firm recommendation? Is it a preliminary deliberation to give the members something to go away with and think about? Are they looking for a variety of different lines to be pursued outside the meeting? Do they have to approve the proposal, or merely note it?

The chair should make sure that all the members understand the issue and why they are discussing it. Often it will be obvious, or else they may have been through it before. If not, then he or someone he has briefed before the meeting should give a short introduction with some indication of the reason the item is on the agenda; the story so far; the present position; what

needs to be established, resolved, or proposed; and some indication of lines of inquiry or courses of action that have been suggested or explored, as well as arguments on both sides of the issue.

It is the chair's responsibility to prevent misunderstanding and confusion. If she does not follow an argument or understand a reference, she should seek clarification from the speaker. If she thinks two people are using the same word with different meanings, she should intervene. He should be on the lookout for points where an interim summary would be helpful. This device frequently takes only a few seconds, and acts like a life belt to some of the members who may be getting out of their depth.

Perhaps one of the most common faults of the chairmanship is the failure to terminate the discussion early enough. Sometimes chairs do not realize that the meeting has effectively reached an agreement, and consequently they let the discussion go on, getting nowhere at all.

A discussion should be closed once it has become clear that:

- more facts are required before further progress can be made
- discussion has revealed that the meeting needs the views of people not present
- members need more time to think about the subject
- events are changing and likely to alter or clarify the basis of the decision
- there is not going to be enough time at this meeting to cover the subject properly

The fact that the decision is difficult, likely to be disputed, or going to be unwelcome to somebody, however, is not a reason for postponement.

At the end of the discussion or action item, the chair should give a brief and clear summary of what has been agreed on. It serves not merely to put the item on record, but also to help people realize that something worthwhile has been achieved.

Dealing with Mavericks and Other Difficult Members

The Maverick. School boards sometimes have members who are mavericks. Through their election to the school board, they feel they have a mandate to correct perceived wrongs in the system. They are the self-appointed watchdogs of the school system. Sometimes they are veteran board members, but often new board members assume the role of maverick. Mavericks tend to have poor relationships with other board members. They forget individual board members have no authority outside school board meeting. They don't realize that board members need to work as a team to accomplish their goals and those of the district. The media loves mavericks. Their outspoken nature makes for good copy, regardless of whether it is accurate, and their antics transform routine board meetings into headlines.

Mavericks generally have good intentions. They are willing to break the rules of boardsmanship and to sacrifice the effectiveness of the board as a unit. However, they genuinely believe that their actions are in the school system's best interests in the long run. While some may relish their role, others may feel isolated—that they don't have an alternative. Mavericks may view

other board members with suspicion. They perceive that their peers don't like them or are distrustful. They don't think their views are welcomed by others, and they are frustrated. Working with a maverick can be vexing for the other school board members. Peers often don't object to what the maverick hopes to accomplish—they resent how the maverick does it, and they resent dealing with peers who aren't playing by the same rules.

This frustration can build to a level where the board is unable to function effectively or efficiently. Frequently victimized by long, fractious meetings, school boards who have reached this boiling point need to lower the temperature and redirect their efforts toward students. Here is a variety of suggestions to help school boards experiencing “Maverick Syndrome.”

- Evaluate your relationship with your peers and the superintendent. Are you a maverick? Do you contribute to a positive atmosphere?
- Suggest the board adopt an appropriate code of conduct.
- Develop long-range plans with clear goals and objectives for the district. Once you have a plan, any diversions will be apparent.
- Conduct a board retreat where such issues a team-building, goals and ideas can be addressed openly.
- “Do lunch” with a board member you have difficulty getting along with so you can discuss your differences privately.
- Elect a strong chair who will ensure meetings are orderly while permitting all members to voice their opinions.
- Never resort to using maverick tactics on the maverick. It only reinforces negative behavior.

Handling Other Difficult Members

In dealing with problem people, always begin with the most subtle and least threatening actions. If a low-key approach doesn't work, then you may need to be more direct, saving the most direct action until last.

The Latecomer always comes to meeting late, making a big commotion, stopping the meeting and wanting to be caught up. As a general rule, don't confront the chronic latecomer in front of the group. Wait until after the meeting to have the conversation. Tip: have the board secretary put the time the board member arrives in the minutes.

The Early Leaver drains the energy of the meeting by leaving before it ends. Like the latecomer, this individual shouldn't be confronted before the group. Tip: have the board secretary put the time the board member leaves in the minutes.

The Broken Record keeps bringing up the same point over and over again. Acknowledge that the point is important to the group. Demonstrate that it has been heard.

The Doubting Thomas constantly puts down everything. “That will never work.” While it is healthy to have a skeptic in any group, aggressive negativism is a damper on creative effort. Get the group to agree to withhold evaluating for a given period of time. Then use this agreement to correct anyone who violates it.

The Headshaker nonverbally disagrees in a dramatic and disruptive manner. They shake heads, roll eyes, cross and uncross legs, slam books shut and push chairs back. One strategy would be to turn to the person and say, "Frank, I see you shaking your head. Looks like you disagree with what's being said. Do you want to share our reactions with the group?"

The Dropout physically withdraws, doesn't say anything or reads a book or is involved in their phone. The best way to approach this is during a break or after the meeting, ask the dropout why she isn't participating. Sometimes giving this person a special task or important assignment may create the necessary involvement. Sometimes the individual may be hurt or angry about something that has gone on in the meeting. Giving this person the chance to articulate those feelings may help.

The Silent One fails to participate even though they may have something important or creative to contribute. The silent one's non-participation may be due to shyness. A board retreat where board members get to know each other helps to create an environment which overcomes the silent one's resistance. The chair may ask the silent one for her opinion. Do not allow other board members to speak so often that a quiet person cannot get a word in edgewise.

The Whisperer constantly whispers to a neighbor. The chair can pause and look at the whisperer until they stop. If two members are really going at it, you can ask, "Do you want to share what you're talking about with the rest of the group?"

The Monopolizer talks too much and says too little. Don't embarrass a monopolizer in front of the group. Interrupt with something like, "That's an interesting point of view (reason, idea, etc.). Let's see what others think about it."

The Attacker launches personal attacks on another member or you as the chair. If two group members are going at it, try to interrupt and get them to talk to you rather than to each other. If you are being attacked, don't defend yourself. Take a moment to collect yourself and say "You feel that I am not.... How do you suggest I could correct that?" Check out the accusation with the group. If they agree, correct the behavior immediately.

The Interpreter speaks for other people, "What Albert is trying to say is..." If Albert is being interrupted you might say, "Hold on a minute, let's let Albert finish making his point."

The Gossiper introduces hearsay and gossip into the meeting. The most common is the "I got a phone call" routine. When you see potentially important information introduced with vague qualifiers, check it out immediately. Defer the discussion until the facts are known.

The Know-It-All uses credentials, age, length of service or professional status to argue a point. Acknowledge her expertise one, but emphasize why the issue is being considered by the group: to consider new alternatives, to hear other points of view, etc.

The Big Cheese is always ducking in and out of the meeting to take phone calls or handle emergencies. And it is pointless to continue the meeting with this person if he is key to the issues being discussed. The best time to deal with this behavior is either before the meeting or right at the beginning of the meeting. Ask this person to agree to hold his calls.

The Interrupter starts talking before others are finished. Often this person doesn't intend to be rude, but simply spits out an idea without realizing that someone else has not finished speaking. As the chair, you should deal with this issue immediately.

Boards that allow mavericks or other difficult people to dominate their activities are hurting their efforts, and, ultimately, the school children they serve. While your friends, family and those "In the know" may perceive your reactions differently, the general public views the board collectively. Each board member has a role in developing a working relationship among board members because each board member—and the board—will benefit when the board acts as a team.

These suggestions for handling difficult people were excerpted from the book, How to Make Meetings Work, by Michael Doyle and David Straus and from an article by Sandra Sims deGraffenried.

How to Handle Groups at School Board Meetings

Do:

- Inform board members and superintendent in advance of a possible "loaded" meeting. Be sure to review specific ground rules to use during the meeting.
- Follow your Board's policy on public participation. The policy should contain ground rules such as a time limit for each speaker. Speakers should be reminded that they are there to speak, but that there is not time in the meeting to answer questions that require detailed explanations. Questions should be referred to the superintendent during regular business hours.
- Listen attentively to each speaker. Thank each person for expressing their views to the board.

Don't:

- Debate or argue with speakers from the audience.
- Answer questions from the audience during the meeting. This is your meeting. You were elected to conduct this business.
- Take questions from the audience during the meeting. You might ask them to contact the appropriate person after the meeting.
- Break your own ground rules. People might be sensitive to rules you ask them to follow and then don't follow yourselves.

Designing the Meeting Space

Environment plays a role in our behavior and reactions to activities in which human beings are involved. Studies have shown that worker productivity is substantially increased when work can be accomplished in a comfortable, non-abrasive setting. Likewise, the environment in which meetings are held affects the conduct and outcome of the meeting.

If the community is unable to see and hear the communications between members of a school board during a board meeting, they may not understand actions taken by the board. Conversely, if board members are unable to see each other clearly, they may fall into commenting on each other's statements with facial expressions, private conversations and body language which can be unbecoming and unproductive. Additionally, if speakers from the audience cannot be heard by others in the audience, as well as board members, important community concerns may not be shared by all present and the democratic deliberations of the board may be hampered.

In addition to the potential adverse effect on communications, poorly organized meeting environments – meeting rooms that are harshly lit, have poor ventilation and uncomfortable temperatures – may cause unnecessary tension and fatigue in board members and the audience.

Because board meetings are open to the public, except on specific occasions, crowd control is another important factor. In creating a successful meeting environment, the public should be given access and egress to and from the meeting in a manner which does not impact on the deliberations. The public should be given comfortable seating with reasonable proximity to the board, yet not allowed to interfere with the orderly dispatch of business.

Check the following criteria in your meeting room:

- Is access to the room limited so that late comers create a distraction?
- Are podiums or microphones provided for speakers where necessary?
- Is a sign-in sheet provided for an orderly procession of speakers?
- Is the room well-lit and comfortable?
- Are all board members able to see each other comfortably?
- Can the public see all of the board members faces?
- Are background materials at a convenient location for public access?

Staff Relations

Getting Personal with Your Superintendent

Circle “T” if the statement is true, and “F” if the statement is false.

1. The dynamics of the board chair’s relationship can be quite different from the relationship as a board member T F
2. When the board chair and superintendent are buddy-buddy, the perception is that they are running everything. T F
3. The board chair should serve as a confidant – an informal sounding board – for the superintendent as he/she grapples with problems that confront the district. T F
4. After the board has made a decision that requires administrative action, the chair personally should determine whether or not the administration has done what the board directed. T F
5. The school board chair may, in an emergency or between regular meetings of the board, approve suspension of the superintendent or any assistant principal, principal or teacher T F
6. Before leaving on a three-week vacation, the superintendent asks you to “keep track of things for me while I’m gone – look in on the new principal now and then to be sure he’s keeping out of trouble.” You should:
 - a. Tell the superintendent to delegate administrative responsibilities to other administrative associates.
 - b. Tell the superintendent you also plan to be away on vacation for the next three weeks.
 - c. Tell the superintendent you’ll be glad to do so.
 - d. Same as “a”, but with a short lecture about mixing up policy making and administrative functions.

Getting Personal

Though you participate in the relationship your board has with its superintendent, the dynamics of that relationship can be quite different from the relationship you as an individual have with the superintendent.

Remember as an individual board member you have no legal authority outside of the board room. Your authority exists only as a member of a collective policy-making body. Given this, it has been said that “the opinions and convictions of individual board members have weight only as they contribute to the discussions and considerations shaping the official decisions of the board.”

Of course, if school boards and superintendents only followed their legal roles, personal relationships would be of little concern. You and your superintendent could put aside all of your personal likes, dislikes, needs and desires.

Unlike the relationship the board has with the superintendent, the relationship you will have with the superintendent can’t help but be personal. It involves you and another human being

and that's personal. One question remains: "What kind of personal relationship will you have with the superintendent?"

Start with Your Attitude

You don't have to let the relationship between the superintendent and yourself happen by chance. You can shape and nourish it assuming the superintendent is willing. To do this you must first decide just how personal and friendly a relationship you want. Board members interviewed about whether board members should be friendly or even social with their superintendents had mixed feelings.

Friendliness has its costs. Some board members are adamant about their reasons for not having a very personal relationship. One reason is to maintain appearances. One Montana board member explains: "It's nice to be personal friends with the superintendent but it causes lots of chatter gossip. When the superintendent and board chairman are buddy-buddy for instance it looks like they are running everything. They normally have to spend a lot of time together so they need to avoid looking like a twosome."

Other board members try to maintain their distance from the superintendent for objectivity's sake. "I've purposely put up a barrier. I feel there is a better way of making my decisions based on facts and not on feelings. I've seen board members and superintendents get so friendly that the superintendent doesn't take them seriously anymore."

Then, of course, there are board members and superintendents who simply don't like each other. One board member explained her situation: Every time I look at him, I cringe. He resents my being on the board and always lets me and everyone else know it. My opinion doesn't matter to him, even though I work hard to understand the issues and contribute to the discussions. It's really hard not to be vindictive when it comes to evaluating his work."

Friendliness also has merits. There are many board members and superintendents who feel good about being friends on both a professional and social level. One superintendent put it this way: "Fortunate superintendents are able to form genuine friendships with individuals of the board. Genuine friendships can survive stress and disagreement." A high degree of mutual trust and confidence between individuals is critical in several respects. First it provides a cushion of human relationship at times when a stress situation threatens disintegration such as a 3 a.m. marathon mediation session. Second it diminishes the likelihood of surprises in critical situations and provides opportunities for necessary face saving. Finally, small talk and humor among friends can be a valuable ingredient of compromise.

Talk to the Superintendent, trust him. Assessing your attitude about the merits and demerits of being friends with the superintendent is your first step in forming your relationship with him. Talking to the superintendent about what he would like in a relationship is your second. Request a private meeting with the superintendent to discuss mutual expectations. It is important at this point to recognize the fact that you can be friends with the superintendent without agreement on everything. As a North Carolina board member said: "We probably never

agree 100 percent on any issue. We have different personalities and our management techniques are different but that doesn't keep us from being friends."

Trust and good communication are inseparable. Trust is a key factor in achieving effective communication on an individual basis. Good communication is open communication and you can't have the latter without mutual trust that allows you to express your feelings.

It's almost a golden rule: You can't be an effective board member without effective communication. It is only through good communication that you will be able to rest assured that board policy is implemented successfully and that the district is running smoothly. One board veteran explains it this way, "As a board member, you do not implement policies. You are not supposed to pass our job assignments, supervise staff or assume any of the tasks that are part of the administrative domain. Since you only meet as a board once or twice a month, the only way you can be sure for yourself and for your constituents that the district is functioning properly is through the communications you have with the superintendent."

Communication is a two-way process. If you have a concern, you should call the superintendent and say so. The superintendent, in time, has a right to expect that he can talk to you about his concerns.

Remember also that many superintendents depend on individual board members to keep them informed of community opinions and concerns. By acting as eyes and ears for the superintendent in the community, you will greatly assist him in knowing what is happening in the district and in controlling rumors.

Keys to a Good Relationship

When asked, "What can a board member do to develop and maintain a good working relationship with the chief administrator?" veteran board members and superintendents gave this advice?

- Know your job and don't interfere with the administration's jobs.
- Devote the time needed to do a good job. Read the background materials the superintendent provides.
- Don't pretend to be an instant expert on school matters. Don't expect to understand all the problems and functions of a school system in a relatively short period of time.
- Admit what you don't know.
- Don't jump to conclusions. Instead hear and weigh all the facts.
- Keep your mind open to change.
- Understand that the superintendent is practice a career – a highly complex one for which he has prepared with formal training and, in most cases, years of progressive experience. His bread and butter is on the line in the practice of that career and for that reason, if not any other, the superintendent can be expected to have learned at least a bit more about the practice of school administration than the average layperson—you, for instance.
- Don't become a complaint department. Communicate with the staff through the superintendent as much as possible. This doesn't mean closing yourself off to teachers, staff, and students, or

ceasing to have some personal contact with the real heart of the matter—the schools. When school employees bring their personal problems to you, they are circumventing the superintendent, an action that can split the administrative team and weaken the effectiveness of the superintendent.

- Don't make promises outside board meetings, not only for legal reasons, but also out of respect for the ethics of the situation and regard for the other board members and the superintendent. The entire idea of democracy and an effective board rests on the concept of collective judgment.
- Whenever you wish to discuss an action of the superintendent that you think was improper, do so in private—away from the glare of publicity. If the charges are so severe that they cast doubt on the ability of the superintendent to manage the district effectively, then the entire board will need to be involved.
- Don't take all the credit. Listen to what your superintendent has to offer and let her know you're listening.
- If someone complains to you about the superintendent, listen but don't agree. Being supportive of the superintendent shows you have confidence in yourself and in the district management team. If the complaint is serious, ask the person to put it in writing and ask the board as a whole to analyze it. Sometimes just requesting that a person put something in writing reduces an issue to a size smaller than that which was first related and interpreted.
- If you must criticize the superintendent or any school employee for that matter, do so constructively. Criticize the work rather than the individual.
- Know your superintendent. Be sensitive to his likes, dislikes, what he does, what he expects of you and the rest of the board, what turns her on and off, and what he needs.
- Be realistic about what the board and the superintendent can accomplish. While it is important to envision the best possible program for children, it is necessary to realize that funds, personnel, and logistics are inhibiting factors.
- Don't surprise the superintendent at a board meeting with resolutions, problems and issues without his prior knowledge. If you "spring" something at a meeting, the superintendent probably will not have the necessary data at hand to allow full and complete discussion of the issue. Incomplete data and discussion lead to unwise decisions.
- Don't evaluate the superintendent's salary by comparing school administration with your occupation.

Board Chair/Superintendent Relations

An effective working relationship is essential between the superintendent, the board chair and the board. The board chair works more closely with the superintendent than with any other staff member employed by the school district. How effectively they work together determines in large part how well the entire educational program will be planned and executed.

A key element in an effective working relationship is open, direct communication. How does it happen? What method will be used? How much the board chair and other board members want to know, and about what things? The answers to these questions can best be learned by meetings between the entire board and the superintendent. The two parties must decide on how the superintendent will communicate with the board and what procedures the board

members will use in communicating with the superintendent. The board chair has to devote many hours and a great deal of effort to bring this about.

Relationships

The board chair requires a special relationship with the superintendent since the two of them will be involved in determining:

- The items on the forthcoming agenda.
- What action is necessary by the board for each item on the agenda.
- What kinds of reports the superintendent will be giving to the board.
- How to handle emergency situations that might arise.
- How to deal with special interest and/or pressure groups.

These items and many more require the board chair to be in continual communication with the superintendent. It must be understood by all board members that communication between the superintendent and the board chair is going to occur and the purpose of the meetings, phone calls, and/or written messages will be shared whenever possible.

Communications

The board should authorize the board chair or the superintendent or both to act as the spokesperson for the board. In actual practice it is most often the superintendent who makes the majority of public announcements. The superintendent should not issue press releases on topics that are of high board interest without their prior knowledge. Board members do not like to read in the newspapers about events of which they had no prior knowledge. This applies to events scheduled for the next board meeting or regular occurrences within or out of the district. The board should give clear, direct guidance to the superintendent in this area.

The Chair & Policy

Leadership Through Policy

Policy permeates and dominates all aspects of school board responsibility. They therefore present the most powerful lever for the exercise of leadership. Leadership through policy offers the opportunity to think big and to lead others into thinking big. Policy leadership clarifies, inspires, and sets a tone of discourse that stimulates leadership in followers.

There are four reasons why policy-focused leadership is a hallmark of governance.

1. **Leverage and Efficiency.** By getting hold of the most fundamental elements of the school system, the board can affect many issues with less effort. However noble their intentions, boards have only so much time available, often measure in hours per year.
2. **Expertise.** Board members do not ordinarily have all the skills required to operate a school system. Governing by policy does not require any of the special expertise which professional educators must possess and it can often be done better without them.
3. **Fundamentals.** When all the decisions that a board has made are sifted and sorted, only those written policy will be of enduring importance. Boards that govern by dealing directly with policy are much more likely to address the most important issues.
4. **Vision and Inspiration.** Dreaming is not only permissible for school board leaders, it is obligatory. Dealing meticulously with the trees rather than the forest can be satisfying, but it does not clarify vision nor inspire others.

To the extent a board wishes to provide strategic leadership, it must clarify policies and expect staff activities to give them life. Making policies explicit and consistent while keeping a spotlight on the policies adopted by the board never allows the governing focus to waiver from constant attention to policies and the school system's fidelity to them.

But attending to policy content, a board can gain far more control over what matters in the school system and be at less risk of getting lost in the details. By focusing on policy the board shows that it understands that it is not responsible for managing, but it fully accepts the responsibility for governing.

Policy and the School Board Chair

As the school board's official leader, the chair primarily determines the extent to which the board governs through policy. Techniques used by the chairmen of boards which most effectively govern through policy include the following:

1. Require policy citations as appropriate on agenda items.
2. Refuse to consider issues which have already been settled in policy.
3. Don't condone failure to follow policy. React quickly and decisively. Involve the board if necessary.
4. Schedule policy issues throughout the year on the annual agenda.
5. Be sure that your policies are carefully examined to delete items which should be administrative procedures. These should be incorporated by the superintendent into an administrative procedure manual.
6. Be proactive in policy development. Get your board to explore new initiatives as policy issues rather than just general discussion or routine business items.
7. Schedule an annual policy review session.

Building a Better Board

Inservice Education: Dollars Well Spent

Should school board members spend school dollars to attend conferences? YES. Here are several good reasons why it's important that board members learn as much as possible about their ever-changing job.

- Being a member of a school board today is different than it was 10 or 20 years ago. The issues are more complex and difficult than ever before. The decisions call for experience, knowledge and training unavailable to a member who does not attend conferences.
- In this day and age, there is no such thing as instant boardsmanship. The decisions today are "people decisions." Nearly 80% of the weight of budget decisions involve people. The most appropriate use of people in helping our children learn is what boardsmanship is all about.
- Boards must know about the latest laws, rules and regulations, as well as recent court decisions. Whether we like it or not, mandates from afar influence local decisions and finances. School board members need to know about these things early to respond before they happen, rather than after.
- Attending meetings gives board members a chance to compare their views and ideas to the thinking of others. There is an opportunity to chat with other board members who, in nearly the same circumstances, have given similar problems much thought.
- Conferences help keep the purposes of the district in mind so that school boards do not get stampeded into inappropriate positions.
- Board members who talk with others from across the state and nation are bound to see the need to maintain local control, to keep the public in public education. Local control is the basis of our system. Public education, in turn is the cornerstone of our democracy.

School board conferences are not junkets at public expense. The cost is a necessary and legitimate expense to assist board members in making good local decisions. A portion of the annual budget should be provided for board in-service education. Think of the cost of not attending.

Self-Evaluation

Prudent school boards should consider voluntarily adopting a formal evaluation system. An evaluation system can show the public how well the board is performing in its role as a governing body. Boards are always being evaluated by the people they represent. For some boards this kind of subjective, informational analysis by the public is evaluation enough. But very few boards today are willing to accept such informal evaluation as adequate for their employees. Union contracts, tenure statutes, and elaborate termination procedures have forced school boards to recognize that employee decisions must be supported by objective assessment.

As with many aspects of school board service, there is no one "right" method of board self-evaluation. How a board views its role will affect the way that the board evaluates itself. For example, if a board assumes its primary role to be the approval of bills and the development of

a budget, then only a simple evaluation is needed. On the other end of the spectrum, if a board sees its role as inextricably tied to the success and failure of all school district programs; if it views itself as the district navigator, charting both the purpose and direction of the district; then there is need for a much more extensive evaluation. A formal evaluation procedure, established by the board members and the central office staff, can provide the board with a way of measuring and observing its own established goals and objectives. Such a process will help school boards to help themselves. Somewhere in between these two extremes lies a self-evaluation technique that is right for your board. Here are some things an evaluation program can do:

- **Identify and Clarify the Board's Purpose.** The first benefit of board evaluation is that the evaluation procedure itself forces boards to identify goals and procedures clearly. An evaluation process demands that the board constantly reassess its progress—as well as its pitfalls—in light of the board's purpose. Because local boards differ dramatically in philosophies, operating procedures, and scope of responsibility, no simple set of goals and procedures has universal application. A formal evaluation system requires school boards to establish written achievement statements—which is itself a benefit beyond the evaluation.
- **Identify Strengths and Weaknesses.** Objectively identifying their own strengths and weaknesses can be of tremendous help to boards in planning, in selecting methods of operation, and in making self-improvements. Because a school board is made up of distinct personalities, attempts at assessing strengths and weaknesses often result in disagreement among individual board members. But by using objective data, the board can determine its strengths and weaknesses without bias.
- **Assessing Success and Failure.** A well-structured evaluation system makes it easy to identify success and failure. School boards can explore programs being implemented to see if they are meeting defined goals and purposes. A formal evaluation system provides a framework for increasing long-range success. For example, if at the midpoint of a board program it's clear that the program isn't working, the board can make the changes necessary to steer the program back on course.
- **Inform the Public.** One basic responsibility of a school board is to communicate effectively with the public. Sharing the results of a formal board evaluation serves this purpose, but it also provides a method for dealing with misrepresentation and rumors. Studies indicate that the public frequently misunderstands the role of the school board member or of the board as a whole. A formal evaluation can help to eradicate faulty perceptions, as well as help to reinforce a positive image for school board members.
- **Promote the Concept of Accountability.** Virtually all school boards support the tenets of accountability. What better example could a board establish for its employees than to adopt a formal evaluation system for itself. Evaluation should begin at the top. Teachers and administrators have every right to raise their eyebrows when boards require rigorous evaluation for employees but fail to adopt a similar procedure for the board.
- **Avoid Abuses of Power.** When one board member or one faction of the board abuses the board's authority, resolving the problems of that abuse is no simple matter. A formal evaluation system can serve as a reminder that, at some point, board members—and the board as a whole—will be held accountable to the public for their actions. Knowing that actions will be

assessed can serve as a deterrent to abuses of power. The evaluation system clearly should identify the proper authority of the board as well as the authority of individual members.

- **Ensure Compliance with Ethical Standards and Regulations.** Membership in national and state organizations imposes ethical standards on local school boards. In addition, most school accrediting agencies have developed standards regarding the governance of member. These standards have direct implications for a board's methods and procedures.
- **Ingredients of effective evaluations.** Although there is no one form of evaluation that will work for all boards, there are some standards school board veterans see as essential evaluation elements and outcomes, such as:
 - An evaluation should be constructive. It should be a tool that is both positive and helpful, assessing both the strengths and weaknesses of a board. It should provide a systematic process by which the members of a board can improve their performance.
 - Board members should develop the standards that measure their relationship with the superintendent; how well they conduct board meetings; and how effectively they plan, make decisions, and policy. Evaluation at the end of the year should be based on what the board planned to do at the beginning of the year.
 - Evaluation should be based on the goals the board sets for itself not on goals it sets for the entire school system. When developing an evaluation instrument, the board should recognize the differences between board goals and district goals.
 - The evaluation process should include board establishment of objectives and strategies for improving board performance. Some boards include in their evaluation instruments a place where evaluators can write in suggestions for improvement. These suggestions are used to set objectives and priorities.
 - The board should not limit itself to those items that appear on the evaluation form. Although an evaluation form will help start board discussion, informal comments also have value.
 - Formal evaluation should occur at least once a year and at a scheduled time and place. Many boards hold annual evaluations with a mid-year review. Once a final report is written, the evaluation process is recycled with the re-establishment of board goals for improvement and accomplishment
 - A composite picture of board strengths and weaknesses is best. Each board member should complete an evaluation form independently. Then the board as a whole should meet to compare and discuss results.
 - The board should be evaluated as a whole, not as individuals. Although some self-evaluation instruments allow for an individual assessment of a board member's strengths and weaknesses, these self-assessments usually are not shared with other members of the board. Evaluations which avoid personal criticism are generally more productive, since they focus on board action rather than personalities.
 - The board should have an orientation and in-service program for its members. Self-evaluation should not occur until all members of the board understand what is expected of them. Fortunately, the NMSBA provides comprehensive new-member training for its member districts. They also provide a training module on board self-evaluation.

The key to the self-assessment process is the result. The self-assessment instrument is based on the responsibilities of the board and the previous goals established by the board. Some example goals:

- The board will improve its relationship with the superintendent
- The board will become more effective in communicating with the public
- The board will allocate more resources to finance the instructional program

The results of the self-assessment process will tell the board if, in fact, it has accomplished its responsibilities and if it has achieved the goals it set.

Any self-assessment of a local board should be established on a timetable which interfaces with establishing goals for a school system and relating these goals to the budget. It is important that a school board make the assessment on an annual basis.

Retreats and Other Activities

As you plan your board evaluation process, you might consider planning to use a retreat setting. Or, as a result of your evaluation, you may wish to hold a special workshop concentrated on board development or other special-interest areas.

Location

Where will you hold your board retreat? It may not be necessary to go off to some distant site. Many boards choose to use their own board room or another school system facility. In considering your location, consider the following questions:

- What are the advantages or disadvantages of holding this meeting in the school district or outside the school district?
- Will all board members be able to attend this session if it is not held locally?
- How much time will be needed for this activity?

Don't fail to consider use of other facilities within your school community—facilities such as a local hotel, community center, corporate conference center, or a school building not usually used for school board meetings. Often, local businesses or organizations will assist by donating use of their facilities or offering special rates. Make your decision based on what is best for your school board.

Some boards choose to use a facility away from the local community. Organizations and corporations have long valued the concept of retreats or conferences away from the normal work site. They recognize the need for relief from the day-to-day pressures and the opportunities that present themselves for team building away from the regular meeting or work location. Some suggestions for locations include: a nearby resort; conference or retreat center; university or college facility; religious organization retreat.

The value of the location rests not in the cost or glamour factor, but in the ability of the board to relax, spend time in constructive activities and not be distracted by school, family or business matters.

Guarantee a Quality Retreat

While the location, costs and logistics of a meeting are important concerns to address, there are other major elements of a quality retreat or meeting to consider to assure a positive experience. At a regular meeting of the board, present the following information and seek consensus for the proposed retreat:

- Expected outcomes of the meeting
- Budget
- Agenda

If reading materials or information need to be reviewed by participants prior to the retreat, make sure that all members have the materials five to ten days in advance of the meeting.

In New Mexico, retreats are meetings that must be posted for the public. No action should be taken at a retreat. Action items should be brought to the next regular board meeting.

Agenda Planning & Preparation

The following list represents some potential outcomes for board retreats:

- Improved communication among board members
- Improved communication between the board and superintendent
- Methods for improving working relationships
- Formal evaluation of the board
- A review of policies and procedures adopted by the board
- Goals and objectives for the board
- Goals and objectives for the school district
- Strategic and long-range plans for the school district

For your retreat to have the maximum opportunity for success, you should keep your expected outcomes to a minimum. After you determine your expected outcomes, develop your agenda. It should be as complete as possible. Make sure that you schedule tentative times for each item and list by name the person who will be primarily responsible for each. If you plan to use a facilitator, allow the facilitator to suggest an agenda format and specific recommendations.

Facilitation

Many boards and superintendents prefer the assistance of a professional facilitator in conducting a retreat or special workshop. The benefits of this approach are two-fold:

- An objective, trained third party conducts the program to allow maximum input from the participants;
- An outside source is sometimes able to deal more effectively with sensitive or controversial issues.

The New Mexico School Boards Association has resources available to help facilitate many of the items that might be covered in a retreat. Check with them if you wish to engage a facilitator.

Realistic Expectations

Remember that relationships and practices that have been in operation for years cannot be undone in one or two days. What can and should result from a board retreat is that lines of communication are opened or reopened, problems are addressed and solutions suggested. What you do with the information and the planning that occur at the retreat is of paramount importance to how you proceed.

If one of your expected outcomes is to heal wounds and improve some sensitive relationships, for example, expect that change to take time. The analogy that board members are married to each other and to the superintendent is appropriate. Marriage, like all relationships, needs time to flourish—to nourish forgiveness, understanding, cooperation, and honesty. Pitfalls and problems in interpersonal relationships are the rule, not the exception.

Most boards meet in the evening following a long day filled with various activities. Agendas are full of business that must be taken care of that evening. The greatest benefit of a retreat can be that the board has the opportunity to sit down, relax, and spend quality time discussing important and sensitive issues in an unhurried manner.

The Best Time

The best time for a board retreat is the right time for you and your board. Some boards prefer week-end retreats so that members do not have to lose time away from their employment. Many boards choose the summer months, often scheduling their retreat just prior to the start of school. When selecting the time for your retreat, so not forget to poll the board and your superintendent for each person's suggestions to keep conflicts to a minimum. It's important that every member attend.

Potentially a good time for a retreat is immediately following an election. Formation of a "new" board offers an outstanding opportunity to provide new and returning board members with information and to build your board/superintendent team. The orientation of new board members is a responsibility of the entire board.

Another good time for a retreat is following the selection of a new superintendent. A retreat gives you a chance to become better acquainted, share expectations, review district history, establish positive working relationships, and plan for the future. It allows the board and the superintendent to start their relationship on the right track.

Holding a retreat prior to or just after state or national association meetings may be an optimal time as the board may attend these meetings as a group, thus saving the additional travel and other expenses of going to a different meeting site. You may take advantage of a facilitator from outside your geographic area. In addition, you will have a chance to share information that you gain at sessions of the state or national meeting or from the many other board members you meet.

Legal Responsibilities

This chapter describes the overall structure of the public elementary and secondary school system in New Mexico. This chapter focuses on the structure, functions and responsibilities of local school boards within that framework. There are eighty-nine local public school districts in New Mexico serving over 305,000 school children. These districts range in size from fewer than 100 students to about 90,000 in Albuquerque. Each district covers a defined geographical area and is governed by an elected local school board.

Public School Code

School Board Structure and Variations

The public elementary and secondary school system in New Mexico is established and governed by the state Public School Code, which is Chapter 22 of the New Mexico Statutes Annotated, 1978 Compilation (abbreviated NMSA 1978). Article 5 of the Public School Code governs the structure, powers and duties of local school boards. Depending on the size of a district and certain other choices, a local board may consist of either five or seven members and the members may be chosen either "at large" or from single-member election districts, depending on the size of the district.

Section 22-5-1, NMSA 1978, sets the size of a local school board at five members. However, Section 22-5-3 goes on to provide that any local board may increase its size to seven members by a resolution to that effect, subject to a possible veto by the voters at a special election. (The Albuquerque Board went to seven members by a direct election under a special provision of the state constitution that only applies to districts with a population of over 200,000.) Section 22-5-3.1 allows a seven-member board to revert back to five members by resolution, again subject to a possible veto by the vote at a special election.

Members of either five-member or seven-member boards must reside within the school district. Section 22-5-1.1, NMSA 1978, requires board members in districts with more than 16,000 population to live in and be elected from single-member districts. Boards in districts with less than 16,000 population have the option of establishing single-member board districts or continuing to elect members at large. (Some boards in this group have set up districts to settle voting rights lawsuits.) Boundaries for single-member districts must be updated once every 10 years after federal census figures are released.

School Board Elections

Local school board members in New Mexico are elected for four-year staggered terms in elections held every two years. A regular school board election is held in each district on the first Tuesday in November of every odd-numbered year (e.g., November 5, 2019). Candidates must be qualified electors of the state who live within the school district, and, for districted boards, must live within the single-member district from which they are seeking election.

Procedures governing the conduct of school board elections are found in Article 22 of the Election Code, which is Chapter 1 of NMSA 1978 and may be cited as the "Local Election Act". All board members elected at regular elections in November take office on January 1. By law, outgoing members continue in office until their successors are elected and qualified, so a Board can continue to function with its old members in case of a contest over qualifications or election results.

Once on a board of education, a board member is expected to regularly attend meetings. In fact, Section 10-3-2, NMSA 1978, specifies that if any member misses four consecutive regular board meetings, the board may declare his/her position vacant by majority vote of the remaining members, and if the board member misses six consecutive regular meetings, his/her position is automatically vacated.

Vacancies on the School Board

From time to time, vacancies occur on a local school board, and the statutes provide a mechanism for filling those vacancies. Section 22-5-9 of the Public School Code provides that vacancies can be filled by a majority vote of the remaining members of the local board. However, if this is not accomplished within 45 days from the date the vacancy occurs, the State Board of Education shall appoint a qualified person to fill the vacancy. In either case, the person appointed serves only until the next regular school board election, when an election is held to fill the vacancy for the remainder of the original term.

Organization of the Board

Section 22-5-7, NMSA 1978, reads as follows: "From among its members, a local school board shall elect a president, vice-president, and a secretary." This provision permits a board, by local policy, to establish the term of office of its officers and the time for election of officers.

Powers and Duties

A local school board shall have the following powers or duties:

- A. subject to the regulations of the department, develop educational policies for the school district.
- B. employ a superintendent of schools for the school district and fix his salary.
- C. review and approve the school budget.
- D. acquire, lease and dispose of property.
- E. have capacity to sue and be sued.
- F. acquire property by eminent domain as pursuant to the procedures provided in the Eminent Domain Code.
- G. issue general obligation bonds of the school district.
- H. provide for the repair of and maintain all property belonging to the school district.
- I. for good cause and upon order of the district court, subpoena witnesses and documents in connection with a hearing concerning any powers or duties of the local school board.
- J. except for expenditures for salaries, contract for the expenditure of money according to the provisions of the Procurement Code.
- K. adopt rules pertaining to the administration of all powers or duties of the local school board.

- L. accept or reject any charitable gift, grant, devise, or bequest. The particular gift, grant, devise, or bequest accepted shall be considered an asset of the district or the public school to which it is given, and
- M. offer and, upon compliance with the conditions of such offer, to pay rewards for information leading to the arrest and conviction, or other appropriate disciplinary disposition by the courts or juvenile authorities, of offenders in case of theft, defacement, or destruction of local school district property. All such rewards shall be paid from school district funds in accordance with rules promulgated by the department; and
- N. give prior approval for any educational program in a public school in the school district that is to be conducted, sponsored, carried on or caused to be carried on by a private organization or agency.

The previous list covers only the basic powers and duties of local school boards as specified in Article V of the Public School Code. Numerous other provisions of state and federal laws and regulations set out further requirements that local boards must adhere to, but the foregoing provides a basic introduction for purposes of this publication.

A member of a board of education is a public officer, but has no power or authority individually. The law vests the power in the board and not in the members thereof, either singularly or otherwise, and these powers must be exercised by the board, at a regular or special board meeting, with action duly recorded in its minutes.

Almost all school board business is required by law to be conducted in meetings open to the public which have been properly advertised. There are some exceptions under the New Mexico Open Meetings Act, which will be discussed in another section.

School boards and their members are managers, at the local level, of one of the biggest businesses in New Mexico. New Mexico has continually ranked high nationally with regard to the percent of the per capita income being placed into education. In most New Mexico communities, the schools are the largest single employer, operate the largest budget, and manage the greatest capital investment. The schools also have the most direct contact with the public and affect more people than any other enterprise, public or private.

As managers, school board members must wear different hats:

1. As elected officials, members of the board of education are representatives of the people of the school district. Regular efforts should be made to ascertain public opinion on matters to be discussed at board meetings. This can be done by providing a specific time on the agenda when the public can appear and be heard; however, this must be controlled, and at times it may be appropriate to set definite time limits in advance on discussions to allow the board to handle the business at hand. Additionally, some school boards have effectively used advisory committees whose membership represent a cross-section of the community. Decisions must be based on the needs of all the people and the overall educational interests of each district's students. Problems should not be

decided on the basis of geographic divisions, personal interests, the demands of special interest groups, political expediency, or bias or prejudice for or against specific individuals or groups.

2. As trustees, school board members are charged with seeing that the schools are well managed, tax dollars are wisely spent, and the investment and interests of the public are protected.

3. As employers, school board members are obligated to maintain fair and equitable employment practices for all employees in keeping with state and federal law, to seek their professional advice and judgment, to support and provide for their needs, and to promote good relationships and morale among the staff. See Appendix B for an introduction to the board's obligations to its employees under the New Mexico Public Employee [Collective] Bargaining Act, passed by the 1992 Legislature.

4. As educational policy-makers, school board members have an obligation to provide valuable learning experiences for all students, to strive to meet the unique and separate needs of the individuals, and to recognize and protect the rights and responsibilities of these young citizens. Since policy-making is a major task and a primary responsibility, the following section will be devoted to this topic.

Policy Making

Policies are guidelines adopted by the board to chart a course of action. They tell what is wanted and may include why and how much. They should be broad enough to permit discretionary action by the administration in meeting day-to-day problems, and yet be specific enough to give clear guidance. Policy-making is the board's major task and primary responsibility. It is essential, therefore, for the board to think through the principles by which it wants the school district to be governed and to record them in the form of comprehensive written policies. The board creates, reinforces or negates policy every time it makes a decision. If a district has no written policies, or if they are not kept up to date, the board's direction of the operation of the district will be inconsistent and probably inequitable to the staff and the public. Ideally, policy should be consistent with, and a natural outgrowth of, the goals of the district. It then becomes a tool for effective management of the schools.

Policy is not created in a vacuum. Past practice, recommendations of the staff, experience of other school districts, legal requirements, anticipation of future problems and advice from outside agencies, such as the New Mexico School Boards Association, New Mexico School Administrators, and State Department of Education, can and should be used in developing policy.

It is often said that the board makes policy and the superintendent administers it. This is not the way in which effective boards operate. In actual practice, the superintendent generally initiates policy formulation and provides the evidence on which the board makes the decisions. The board considers the statement and the evidence and accepts, rejects, or revises the statement. Once a policy is adopted, the superintendent does administer it. The board, however, must continue to receive reports, to evaluate the results of the policy, and when indicated, to revise the policy in light of experience.

The policies of a school district should be reviewed at regular intervals - in fact, an annual review is required by State Board of Educational Standards. The Standards further require that staff and others be involved in the policy-making. It is part of a board member's responsibility to see that policy is established, followed and revised when revision is needed.

Since one of the purposes of policy is to promote equitable treatment of students, employees, and members of the public, deviation from established board policy should be infrequent. Otherwise, the policy will be undermined.

Compensation

Section 22-5-5, NMSA 1978, provides that school board members shall serve without compensation and that no member shall be employed in any capacity by the district during the entire term for which the member was elected, even if the board member resigns from the board before the end of the term. A board member, however, shall be entitled to per diem for in-state or out-of-state travel while performing official duties as a board member. Also, reimbursement for mileage is allowable. The rate to be paid shall be established by policy of the board and in accordance with the Per Diem and Mileage Act [10-8-1 et.seq., NMSA 1978].

Required Board Member Training

22-5-13 LOCAL SCHOOL BOARD TRAINING –The department shall develop a mandatory training course for local school board members that explains state board rules, department policies and procedures, statutory powers and duties of local school boards, legal concepts pertaining to public schools, finance and budget and other matters deemed relevant by the department. The department shall notify local school board members of the dates of the training course, the last of Which shall not be later than three months after a local school board election.

The State Board of Education's Educational Standards, Chapter One, A.1.1.1.aa states that a function of the local board of education is to:

"Ensure that each member of the board participates in a planned program of training on an annual basis which will assist in the performance of functions outlined". In

implementing this regulation, the State Board of Education has listed the following:

1. Training must address one or more of the functions stated in Educational Standard A.1.1.1.
2. Training must be planned to meet needs of an individual board member or needs defined by the board as a whole.
3. Specific training may be required by SBE as a result of routine monitoring processes.
4. Training can be conducted by consultants contracted by the board, New Mexico School Boards Association, state agency staff or others deemed qualified by the local board. Attendance at regional, state, or national conferences can be acceptable training.
5. Records of training for each board member shall be maintained in the files of the local district.

A. The local board of education shall:

(1) exercise powers and duties pursuant to the Public School Code and public school regulations, Section 22-1-1 et seq. NMSA 1978, and other applicable regulations;
(2) approve and support the district's EPSS and each school site-level EPSS action plan;

(3) employ and evaluate the local superintendent'

(4) ensure that each member of the board participates in a planned program of training which will assist in the performance of specified duties. All local school board members must receive a total of five hours of annual training.

(a) for newly elected or appointed local school board members who are in office for less than a year, they shall receive three of the five hours from attending a training course developed by the public Education Department ("PED") and sponsored by the New Mexico School Boards Association ("NMSBA"). This course shall be offered no later than three months after a local school board election. The PED will periodically announce the dates of these courses which will cover numerous topics including PED policies and procedures, statutory powers and duties of local boards, legal concepts pertaining to public schools, finance and budget. For the additional two hours of annual training for these new board members, these board members shall attend sessions sponsored by the NMSBA, approved by the PED.

(b) For all existing local school board members, they shall attend five hours of annual training sponsored by the NMSBA, approved by the PED.

(c) In order to be credited with attendance at these courses, each attendee must comply with written attendance procedures established by the PED. Prior to September 1st, the NMSBA shall provide each local superintendent with a list of training hours earned annually by each local school board member.

(5) delegate administrative and supervisory functions to the local superintendent;

(6) refrain from involvement in delegated administrative functions;

(7) review, revise as needed, and submit policies to PED on an annual basis;

(8) award diplomas to students who have successfully completed graduation requirements;

(9) ensure the alignment of district curricula with Content Standards with Benchmarks'

(10) ensure that district funds are appropriately managed and disbursed;

(11) be responsible for oversight of revenue and expenditures within the district budget;

(12) accept responsibility for ensuring the success of each school in the district.

B. The local superintendent shall:

(1) administer local board policies and state and federal regulations including the Public School Code;

(2) be accountable for student achievement, budget management, expenditure of funds, dissemination of information, district communications, and the development, implementation, and evaluation of the EPSS, and all other district business;

(3) attend all board meetings or, when necessary, designate a licensed administrator to attend;

(4) ensure that school patrons and the public are informed and involved in the acquisition, planning, and development of school facilities, and that students are provided with adequate facilities which conform to state and federal mandates;

(5) ensure that all students are supervised; and

(6) administer and implement

the district's approved staff accountability plan and procedures.

School boards in New Mexico are required to operate under the Open Meetings Act. The text of the act follows:

NEW MEXICO OPEN MEETINGS ACT

NMSA 1978 § 10-15

10-15-1 Formation of public policy; procedures for open meetings; exceptions and procedures for closed meetings.

10-15-1.1 Short title.

10-15-2 State legislature; meetings.

10-15-3 Invalid actions; standing

10-15-4 Penalty.

10-15-1. Formation of public policy; procedures for open meetings; exceptions and procedures for closed meetings.

A. In recognition of the fact that a representative government is dependent upon an informed electorate, it is declared to be public policy of this state that all persons are entitled to the greatest possible information regarding the affairs of government and the official acts of those officers and employees who represent them. The formation of public policy or the conduct of business by vote shall not be conducted in closed meeting. All meetings of any public body except the legislature and the courts shall be public meetings, and all persons so desiring shall be permitted to attend and listen to the deliberations and proceedings. Reasonable efforts shall be made to accommodate the use of audio and video recording devices.

B. All meetings of a quorum of members of any board, commission, administrative adjudicatory body or other policymaking body of any state agency, any agency or authority of any county,

municipality, district or any political subdivision, held for the purpose of formulating public policy, including the development of personnel policy, rules, regulations or ordinances, discussing public business or for the purpose of taking any action within the authority of or the delegated authority of any board, commission or other policymaking body are declared to be public meetings open to the public at all times, except as otherwise provided in the constitution of New Mexico or the Open Meetings Act [Chapter 10, Article 15 NMSA 1978]. No public meeting once convened that is otherwise required to be open pursuant to the Open Meetings Act shall be closed or dissolved into small groups or committees for the purpose of permitting the closing of the meeting.

C. If otherwise allowed by law or rule of the public body, a member of a public body may participate in a meeting of the public body by means of a conference telephone or other similar communications equipment when it is otherwise difficult or impossible for the member to attend the meeting in person, provided that each member participating by conference telephone can be identified when speaking, all participants are able to hear each other at the same time and members of the public attending the meeting are able to

hear any member of the public body who speaks during the meeting.

D. Any meetings at which the discussion or adoption of any proposed resolution, rule, regulation or formal action occurs and at which a majority or quorum of the body is in attendance, and any closed meetings, shall be held only after reasonable notice to the public. The affected body shall determine at least annually in a public meeting what notice for a public meeting is reasonable when applied to that body. That notice shall include broadcast stations licensed by the federal communications commission and newspapers of general circulation that have provided a written request for such notice.

E. A public body may recess and reconvene a meeting to a day subsequent to that stated in the meeting notice if, prior to recessing, the public body specifies the date, time and place for continuation of the meeting and, immediately following the recessed meeting, posts notice of the date, time and place for the reconvened meeting on or near the door of the place where the original meeting was held and in at least one other location appropriate to provide public notice of the continuation of the meeting. Only matters appearing on the agenda of the original meeting may be discussed at the reconvened meeting.

F. Meeting notices shall include an agenda containing a list of specific items of business to be discussed or transacted at the meeting or information on how the public may obtain a copy of such an agenda. Except in the case of an emergency or in the case of a public body that ordinarily meets more frequently than once per week, at least seventy-two hours prior to the meeting, the agenda shall be available to the public and posted on the public body's web site, if one is maintained. A public body that ordinarily meets more frequently than once per week shall post a draft agenda at least seventy-two hours prior to the meeting and a final agenda at least thirty-six hours prior to the meeting. Except for emergency matters, a public body shall take action only on items appearing on the agenda. For purposes of this subsection, "emergency" refers to unforeseen circumstances that, if not addressed immediately by the public body, will likely result in injury or damage to persons or property or substantial financial loss to the public body. Within ten days of taking action on an emergency matter, the public body shall report to the attorney general's office the action taken and the circumstances creating the emergency; provided that the requirement to report to the attorney general is waived upon the declaration of a state or national emergency.

G. The board, commission or other policymaking body shall keep written minutes of all its meetings. The minutes shall include at a minimum the date, time and place of the meeting, the names of members in attendance and those absent, the substance of the proposals considered and a record

of any decisions and votes taken that show how each member voted. All minutes are open to public inspection. Draft minutes shall be prepared within ten working days after the meeting and shall be approved, amended or disapproved at the next meeting where a quorum is present. Minutes shall not become official until approved by the policymaking body.

H. The provisions of Subsections A, B and G of this section do not apply to:

(1) meetings pertaining to issuance, suspension, renewal or revocation of a license, except that a hearing at which evidence is offered or rebutted shall be open. All final actions on the issuance, suspension, renewal or revocation of a license shall be taken at an open meeting;

(2) limited personnel matters; provided that for purposes of the Open Meetings Act [10-15-1.1 NMSA 1978], "limited personnel matters" means the discussion of hiring, promotion, demotion, dismissal, assignment or resignation of or the investigation or consideration of complaints or charges against any individual public employee; provided further that this subsection is not to be construed as to exempt final actions on personnel from being taken at open public meetings, nor does it preclude an aggrieved public employee from demanding a public hearing. Judicial candidates interviewed by any commission shall have the right to demand an open interview;

(3) deliberations by a public body in connection with an administrative adjudicatory proceeding. For purposes of this

paragraph, an "administrative adjudicatory proceeding" means a proceeding brought by or against a person before a public body in which individual legal rights, duties or privileges are required by law to be determined by the public body after an opportunity for a trial-type hearing. Except as otherwise provided in this section, the actual administrative adjudicatory proceeding at which evidence is offered or rebutted and any final action taken as a result of the proceeding shall occur in an open meeting;

(4) the discussion of personally identifiable information about any individual student, unless the student, his parent or guardian requests otherwise;

(5) meetings for the discussion of bargaining strategy preliminary to collective bargaining negotiations between the policymaking body and a bargaining unit representing the employees of that policymaking body and collective bargaining sessions at which the policymaking body and the representatives of the collective bargaining unit are present;

(6) that portion of meetings at which a decision concerning purchases in an amount exceeding two thousand five hundred dollars (\$2,500) that can be made only from one source and that portion of meetings at which the contents of competitive sealed proposals solicited pursuant to the Procurement Code are discussed during the contract negotiation process. The actual approval of purchase of the item or final action regarding the selection of a contractor shall be made in an open meeting;

(7) meetings subject to the attorney-client privilege pertaining to threatened or pending litigation in which the public body is or may become a participant;

(8) meetings for the discussion of the purchase, acquisition or disposal of real property or water rights by the public body;

(9) those portions of meetings of committees or boards of public hospitals where strategic and long-range business plans or trade secrets are discussed; and

(10) that portion of a meeting of the gaming control board dealing with information made confidential pursuant to the provisions of the Gaming Control Act.

I. If any meeting is closed pursuant to the exclusions contained in Subsection H of this section, the closure:

(1) if made in an open meeting, shall be approved by a majority vote of a quorum of the policymaking body; the authority for the closure and the subject to be discussed shall be stated with reasonable specificity in the motion calling for the vote on a closed meeting; the vote shall be taken in an open meeting; and the vote of each individual member shall be recorded in the minutes. Only those subjects announced or voted upon prior to closure by the policymaking body may be discussed in a closed meeting; and

(2) if called for when the policymaking body is not in an open meeting, shall not be held until public notice, appropriate under the circumstances, stating the specific provision of the law authorizing the closed meeting and stating with reasonable specificity the subject to

be discussed is given to the members and to the general public.

J. Following completion of any closed meeting, the minutes of the open meeting that was closed or the minutes of the next open meeting if the closed meeting was separately scheduled shall state that the matters discussed in the closed meeting were limited only to those specified in the motion for closure or in the notice of the separate closed meeting. This statement shall be approved by the public body under Subsection G of this section as part of the minutes.

10-15-1.1 Short title

Chapter 10, Article 15 NMSA 1978 may be cited as the "Open Meetings Act".

10-15-2. State legislature; meetings.

A. Unless otherwise provided by joint house and senate rule, all meetings of any committee or policy-making body of the legislature held for the purpose of discussing public business or for the purpose of taking any action within the authority of or the delegated authority of the committee or body are declared to be public meetings open to the public at all times. Reasonable notice of meetings shall be given to the public by publication or by the presiding officer of each house prior to the time the meeting is scheduled.

B. The provisions of Subsection A of this section do not apply to matters relating to personnel or matters adjudicatory in nature or to investigative or quasi-judicial proceedings relating to ethics and conduct or to a caucus of a political party.

C. For the purposes of this section, "meeting" means a gathering of a

quorum of the members of a standing committee or conference committee held for the purpose of taking any action within the authority of the committee or body.

10-15-3. Invalid actions; standing.

A. No resolution, rule, regulation, ordinance or action of any board, commission, committee or other policymaking body shall be valid unless taken or made at a meeting held in accordance with the requirements of Section 10-15-1 NMSA 1978. Every resolution, rule, regulation, ordinance or action of any board, commission, committee or other policymaking body shall be presumed to have been taken or made at a meeting held in accordance with the requirements of Section 10-15-1 NMSA 1978.

B. All provisions of the Open Meetings Act shall be enforced by the attorney general or by the district attorney in the county of jurisdiction. However, nothing in that act shall prevent an individual from independently applying for enforcement through the district courts, provided that the individual first provides written notice of the claimed violation to the public body and that the public body has denied or not acted on the claim within fifteen days of receiving it. A public meeting held to address a claimed violation of the Open Meetings Act shall include a summary of comments made at the meeting at which the claimed violation occurred.

C. The district courts of this state shall have jurisdiction, upon the application of any person to enforce the purpose of the Open Meetings Act, by injunction, mandamus or other appropriate order. The court shall award costs and reasonable attorney fees to any person who is successful in bringing a court action

to enforce the provisions of the Open Meetings Act. If the prevailing party in a legal action brought under this section is a public body defendant, it shall be awarded court costs. A public body defendant that prevails in a court action brought under this section shall be awarded its reasonable attorney fees from the plaintiff if the plaintiff brought

the action without sufficient information and belief that good grounds supported it.

D. No section of the Open Meetings Act shall be construed to preclude other remedies or rights not relating to the question of open meetings.

10-15-4. Penalty.

Any person violating any of the provisions of Section 10-15-1 or 10-15-2 NMSA 1978 is guilty of a misdemeanor and upon conviction shall be punished by a fine of not more than five hundred dollars (\$500) for each offense.

Executive Sessions

The Open Meetings Act allows for executive sessions not open to the public in very specific circumstances. Please note section 10-15-1-H above for the specific language of the statute. Going into executive session is like going into a hot oven...board members should know what is needed to be done before going in and should get it done quickly and get out. What is said in executive session is privileged. It should never be repeated.

Filling a Board Vacancy

The law:

22-5-9. Local school board vacancies

- A. A vacancy occurring in the membership of a local school board shall be filled at an open meeting, at which a quorum of the membership is present, by a majority vote of the remaining members appointing a qualified elector to fill the vacancy.
- B. A qualified elector appointed to fill a vacancy occurring in the membership of a local school board shall hold that office until the next regular school district election when an election shall be held to fill the vacancy for the unexpired term.
- C. If a qualified elector is not appointed to fill the vacancy within forty-five days from the date the vacancy occurred, the department shall appoint a qualified elector to fill the vacancy until the next regular school district election.
- D. In the event vacancies occur in a majority of the full membership of a local school board, the department shall appoint qualified electors to fill the vacancies. Those persons appointed shall hold office until the next regular school district election when an election shall be held to fill the vacancies for the unexpired terms.

The New Mexico School Boards Association provides a document of Suggestions for Filing a School Board Vacancy. This a suggested procedure for filling a school board vacancy. The only requirements are those stated in the law.

1. Board establishes timeline for board member selection. (Remember, you have 45 days from resignation to fill the vacancy. If board does not fill the vacancy in that period the Secretary of Education fills the vacancy).
2. Board issues Notice of Vacancy to the public (via a paid ad/letter in newspaper) which includes:
 - a. Qualifications (registered voter/resident of school district or resident of board district if districted)

- b. Required documents such as letter of interest, resume, request to answer questions (why interested, etc.)
 - c. Deadline for receipt of letters of interest.
3. Board accepts letters of interest, resumes, etc.
4. Board reviews information and determines eligibility.
5. Board determines if applicants will be interviewed or not.
6. Board decides if community groups will participate in the interviews (eg, PTA, Chamber of Commerce) or not.
7. If necessary, interview schedule is prepared.
8. Board conducts interviews.
9. Board discusses applicants and selects replacement in open meeting by majority vote.
10. Board advises Secretary of Education that the vacancy has been filled.

Please remember that all discussions and actions must be in an open public meeting properly advertised. None of the discussion relating to replacement of a board member may take place in executive session or outside a board meeting via phone or private meetings. Also, keep in mind there is no requirement for advertising, interviews or involvement of other groups. These are merely suggestions.

Public schools deal with two of your community's most important resources: its money and its children. As a result, schools are news. Big news. Sometimes the schools are not the source of good news. Things do go wrong, and the media and public want to know about it. But often schools are the source of good news. Successful programs, meaningful community involvement, good management and planning are often taken for granted.

While it would be nice if the media focused more on the positive, the reality is that schools are a public institution, and the news media perceives its role as that of a watchdog for the public interest. The challenge, then, is to deal sensibly and effectively with the media when the news is bad and to develop techniques and relationships designed to improve the odds of receiving more coverage when the news is good.

Establishing a Relationship

Face-to-face communications are the most effective means for changing attitudes and establishing opinions. Face-to-face relationships with the news media are valuable, too, no matter how busy you are. They are a time investment you can't afford to overlook.

As you become more important to your district, you become more important to your community and the reporters that cover that community. To them, you are a newsmaker, a resource person, a "quote person" and—too often—a stranger.

- Make an effort to meet regularly with the reporters who cover your district. This might mean visiting their offices, getting together for lunch, making appoint to chat with them at community (not school-related) affairs or have a media briefing.

- Ask for—and listen to—what reporters have to say about your district. These people are in close touch with many facets of your community and may have a good feel for what the community thinks about various educational issues and programs.
- Watch, listen and read the media that cover your district so you are familiar with their formats.
- Periodically pick up the phone and tell a reporter when he or she did a good job.
- Keep in mind that the media is not in business to help you with your communications needs. It is in business to (1) make money and (2) disseminate news. News is information that is of interest to the public. Some of the information you'll need to disseminate to your public isn't news and you shouldn't expect it to be used by the news media. On the other hand, many opportunities for news are often overlooked because they aren't brought to the media's attention in a newsworthy manner or useable format.

Getting Organized

Establishing good media relations not only depends on good relationships between people, it also depends on your being organized so you can respond to the media's needs and provide timely, accurate information.

- Have the following on file about the media that cover your district: name, address, phone number, name of reporter or assignment desk editor, deadlines, coverage area and special topics of interest.
- Provide each media representative with a basic information packet about your district for background use. The packet might contain a one-page fact sheet covering enrollment, budget highlights, numbers of employees (by groups), time and date of school board meetings, square mileage of district, a map of the district, a "mini-directory," which provides names, addresses and phone numbers of the superintendent and school board, along with a listing of all schools and departments including the site address, phone number and name of the administrator in charge, and the phone number of the designated district spokesperson.
- Determine who the spokesperson (contact person) is for your district. Be certain that this person is kept informed and has the authority to connect the reporter with the appropriate source of information.
- Spend some time to learn how the media in your community operates.
- Provide reporters a glossary of educational terms and acronyms. Although this will not excuse you from communicating clearly, a reporter armed with such a glossary might be able to avoid making errors when reporting educational news.
- Add the media representatives to your special mailing lists for district newsletters, special purpose brochures, school board agendas and minutes and special reports.
- Communicate clearly to all concerned that the designated spokesperson assigned by the superintendent is acting on the system's behalf and that information this person is requesting is, in essence, being requested by the superintendent or board chair.
- Ask the superintendent to inform the staff how inquiries from the media are to be handled.

When you are asked to respond to a media inquiry

Even if you have a public information specialist on your staff, you and the superintendent are still the primary district spokespersons and should respond to the media's inquiries in a timely and accurate manner.

When the media calls you for a comment, the reporter wants to talk to you now. A common complaint that reporters have about educators and board members is their easy accessibility when they want a story to be told, and their inaccessibility when the news is not so good. It is in your best interest in the long run to establish a consistent policy of forthright responsiveness to all media inquiries.

- If when a reporter calls and you are unavailable, try to get the reporter's deadline. If you can't respond before the deadline, ask if someone else could provide the information or is it a matter to which only you can respond. The more insistent the reporter is about speaking with you, the more important it probably is that you talk to them.
- When giving a reporter an impromptu statement on the phone, jot down what you said. This will provide for consistency of response in the event another reporter calls on the same subject and could be helpful in the event you are seriously misquoted.
- If an issue heats up, acknowledge the very real possibility that a reporter will call and ask you about it. Go over in your mind the kind of questions you might be asked and determine the kind of messages you want to communicate. This process can be helpful with lots of other people too, including board members and parents.)
- Avoid saying "no comment," unless you want the reporter to report that you would not answer her question or interpret why you are not answering her questions
- If you are faced with a question you can't or don't want to answer, tell the reporter you are not ready to answer that question and provide a reason. A helpful response to a question on a personnel matter may be "I would like to answer that question, but I'm concerned that some of the information may be confidential (by board policy or law)."
- Be cautious when you're "off the record." While some reporters may keep the information confidential and use it only for their background knowledge, there is the possibility that something you say "off the record" could be very news worthy and could appear in the media because the reporter has taken your tip and found someone who would confirm it "on the record"
- Don't be afraid to say "I don't know, I'll call you back in 15 minutes" when you are unsure of your facts. Check your facts and call back...in 15 minutes or less!

If a reporter interrupts you before you have finished answering a question, pause, let the reporter finish and then continue your answer. Don't get into a shouting match, but don't let the interviewer tell you when you have finished your answer. However, if the reporter keeps interrupting, there may be a reason.

- If a reporter asks several questions at once, say something like "You've asked several questions here. Where would you like me to begin?"
- Don't repeat the reporter's terms unless you want to be quoted on them.
- If a radio reporter calls you, assume the conversation is being recorded. Keep your answers short and to the point.
- Never – absolutely never – lie to a reporter (or anyone else).

Getting the Good News Out

News releases, fact sheets, tip sheets and media advisories are all part of your arsenal to get the good news about your district to the media. Generally, districts that have public information specialists issue more news releases and media advisories and tend to get more coverage because the specialist is trained to perform this function.

But districts that do not have public relations personnel can also get their share of positive coverage by trying some different approaches.

The truth is that there are literally dozens of topics that could provide positive coverage for your district if they were presented in a manner that makes them interesting to the reporter and the public.

- Be alert to opportunities to tie your story in with a story in the national limelight.
- Use the telephone. When you have a good feature...like a graduate with 12 years perfect attendance or a new before-and-after day care program...pick up the phone and tell the reporters covering your district about it.
- Take advantage of the news opportunities at your school board meeting. By making sure the media has full and complete back-up information, is aware of board meetings at which major issues or new programs will be discussed, you can improve the media's coverage of your school board.
- Look for alternative media outlets. A story about senior citizen volunteer opportunities might receive good play in the senior citizens' center newspaper; the new business education curriculum might make interesting reading for the chamber of commerce; and the city's newsletter might love to carry an article on "youth in government" day.
- Ask each site to designate a "reporter." Give them some training (perhaps led by a reporter from your local newspaper) on what the media needs in terms of format, style and content.
- If you have a public relations person on your staff, help this person to be more effective by:
 - Making sure your building administrators know to whom news and information should be channeled.
 - Emphasizing that the public relations person does not have a crystal ball (and neither does the media) and depends on information.
 - Letting your staff know that the PR person's priority is to provide news that the public must know and should know.
 - Encourage staff members at all levels to share story ideas.

Social Media

Many school districts and school board members are active contributors on social media. Social media can be a useful tool to engage the community in activities and issues. There are several things that the board chair and other members should keep in mind when posting on social media.

1. If you post about school district issues, ensure that you are clear in communicating that you are commenting as a board member, not as a spokesperson for the district
2. Avoid a rolling quorum by engaging with other board members on school board business.

3. Be sure to properly direct any positive or negative comments to the proper administrator in the district.
4. Avoid opining on any open school district business that would indicate that you have formed an opinion outside an open meeting.
5. Ensure that any district information that you share has been released for the public.
6. Remember that your presence on social media reflects on the district as a whole.
7. Immediately report any negative communications to the superintendent if they involve any school district staff or students.

There are some things we say and do that make us unpopular with the media. Here are some tips to keep your media relations on a positive note:

- Keep your cool both on social media and with reporters. It's easy to get emotionally involved in a school issue, but it doesn't help you when you're dealing with the media. Count to 10, take some deep breaths and remember it's not you personally who is being attacked, it's the district's position on an issue that is being scrutinized.
- Pick your battles. Remember the words of an old sage who said he made it a practice never to fight with someone "who bought ink by the barrels and paper by the bon."
- You do have the right and responsibility to complain when the media is inaccurate. Take your complaint to the reporter first and point out the factual mistake. If the factual error continues, you will want to contact the reporter's boss next, but be sure you have the documentation to support your claim.
- Don't be afraid to admit mistakes when you make them. If something goes wrong, admit it and tell the media what you're doing about it. It's always better to be on the proactive side when there's bad news to be told.

Committees

Did you ever wonder why some school boards have several standing committees? Early in the history of school boards, the practice of dividing the group into committees for special purposes was common. School boards administered the school system without the benefit of administrators. During recent years, administrators have been delegated management responsibilities and school boards have focused on their governance responsibilities of policy making, planning and promotion of the school district. However, sometimes temporary committees may be used to accomplish some task of the Board, such as developing a strategy document or reviewing policies.

In New Mexico, the School Board Statute requires that each local school board appoint an audit committee. The text of that statute follows:

Except as otherwise provided in this section, each local school board shall appoint an audit committee that consists of two board members, one volunteer member who is a parent of a student attending that school district and one volunteer member who has experience in accounting or financial matters. The superintendent and the school district business manager shall serve as ex-officio members of the committee. A local

school board with more than five members may appoint more than two board members to its audit committee. The audit committee shall:

- (1) evaluate the request for proposal for annual financial audit services;
- (2) recommend the selection of the financial auditor;
- (3) attend the entrance and exit conferences for annual and special audits;
- (4) meet with external financial auditors at least monthly after audit field work begins until the conclusion of the audit;
- (5) be accessible to the external financial auditors as requested to facilitate communication with the board and the superintendent;
- (6) track and report progress on the status of the most recent audit findings and advise the local school board on policy changes needed to address audit findings;
- (7) provide other advice and assistance as requested by the local school board; and
- (8) be subject to the same requirements regarding the confidentiality of audit information as those imposed upon the local school board by the Audit Act [12-6-1 through 12-6-14 NMSA 1978] and rules of the state auditor.

Ad Hoc Committees

Virtually all districts have occasion to establish an ad hoc committee, usually consisting of three board members and potentially other members. These committees are setup for a very specific purpose with a definite timeline. The committee is subject to the Sunshine Law.

Examples of ad hoc committees would include activities such as planning to participate in a retreat of self-evaluation, investigating various ways in which to conduct a superintendent search, or how to get community involvement on the future of the schools. Once the committee has done its work and reported to the full board, it is disbanded.

Be sure to check your Board's Policy Manual for guidance on setting up any other committees that the Board may wish to establish.

Advantages and Disadvantages of Committees

School boards are designed to function as a unity while committee work tends to divide the board. Like most things in life, there are perceived advantages and disadvantages to using committees.

Advantages

- Allows more work to be done without the need for all members to consider each issue.
- If an administrator is a member of each committee, it helps promote trust and understanding of the complexities of issues.
- Working with administrators in committees allows board members to really find out what is going on in the system.
- Committees allow the board to explore many issues the full board would never get to.

Disadvantages

- Tends to get board members involved in administrative detail and away from their role as policymakers.
- Committees can lead to “fiefdoms of power.” Rubber stamp my committee’s recommendations and I’ll rubber stamp yours.
- Committee meetings require time in addition to regular school board meetings.
- Committees are a way for board members to formulate policy without full debate.

How to Design a Committee

- Select a self-starting, qualified chairman.
- Select members with sufficient knowledge and time to serve. Keep the committee as small as practical to foster discussion.
- Define the task of the committee in specific terms.
- Suggest that the committee set regular meeting dates.
- Set time limits on the term of the committee or when the work must be finished.
- Require interim progress reports on a regular basis.
- Committees must understand up-front that they serve in an advisory capacity only.

Effective Boardmanship

The job of being a good board member and thereby being a good chair is very complex, and there are no hard and fast rules that deal with all aspects of the job. Experienced board members state that it takes about two years to learn the job. If that statement is true, it behooves new board members to observe how the system works. Within the system, there are ways of bringing about change without the need for a revolution or chaos before change takes place. The following are intended as hints, or guides, that may help you in being an effective board member:

An effective board member:

1. Attends all meetings of the board.
2. Is legally a board member only when the board of education is in session. No one person, unless authorized, should speak on behalf of the board.
3. Recognizes his responsibility is not to run the schools, but to see that they are run well by others.
4. Is well acquainted with school policies.
5. Voices opinions frankly in board meetings and votes for what is in the best interest for the children of the district.
6. Is flexible and realizes there are times when changes must be made, when tradition cannot be honored, and when pressure must be ignored.
7. Remembers that board business, at times, requires confidentiality, especially in processes involving personnel, legal matters, and land acquisition.

8. Is interested in obtaining facts, but remembers that the administration has the responsibility of operating the schools, not spending a great deal of time gathering data or making reports to the individual board member.
9. Knows that the reputation of the entire school district is reflected in his/her behavior and attitude.
10. Is able to sift fact from fiction, to sort out rumors from realism, and to know the difference.
11. Refers, as far as possible, all complaints and requests to the appropriate administrative officer.
12. Maintains harmonious relations with other board members when harmonious relations are consistent with his/her obligations to the schools.
13. Uses good ethical and moral judgment in all decisions that he/she makes.

Appendix

Helpful Links

- New Mexico School Boards Association School Board Member Handbook
<http://www.nmsba.org/handbooks/>
- Open Meetings Act Masterclass Presentation – Ortiz & Zamora
<http://www.nmsba.org/wp-content/uploads/2019/03/Open-Meetings-Act-Masterclass.pdf>
- Open Meetings – Don’t Crash – Cuddy & McCarthy
<https://cuddymccarthy.com/wp-content/uploads/XX.-OMA-Dont-Crash-Course-1.pdf>
- New Mexico Open Meetings Act Manual
<https://www.nmag.gov/uploads/files/Publications/ComplianceGuides/Open%20Meetings%20Act%20Compliance%20Guide%202015.pdf>
- NM School Boards Statute
<https://law.justia.com/codes/new-mexico/2019/chapter-22/article-5/>