



NEW SCHOOL BOARD MEMBER HANDBOOK

2021 Edition



Supporting, Promoting and Advancing Public Education

The WASB New School Board Member Handbook is designed to provide general information and commentary as a service to WASB members based on current law and agency guidance as it existed at the time of publication. It should not be relied upon as legal advice. If legal advice is needed, the services of the school district's designated legal counsel should be obtained.

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Introduction

The WASB New School Board Member Handbook provides information about the basics of school board service and answers questions commonly asked by new board members. It's written in a question-and-answer format for quick reading. It includes references to relevant sections of state statute, a glossary of common education terms and a list of commonly used acronyms that new board members may find helpful.

The handbook draws on the deep well of knowledge and expertise of the WASB. It includes references to information available at WASB.org as well as the varied programs and services the WASB offers its members.

The online version of this handbook (pdf and html) includes dozens of embedded links to the referenced statutes, WASB resources and other guidance. Some WASB resources may be password protected for members only.

Note to new members:

By late April or early May, school district staff usually provide the WASB with contact information for all newly elected school board members. Once that contact information has been entered into the WASB's membership database, a new board member should be able to use his/her primary school board email address as his/her username for the WASB website.

The first time you attempt to login to the WASB website, navigate to the login screen and then click on the link labeled "Forgot your password?" On the next screen, enter the email address that is on file with the WASB in the field that is provided for the username, and then click the "Get New Password" button. A link will be sent to you via email. Follow the link and the subsequent prompts to set a password. If you have any difficulty, please send an email to info@wasb.org or call the WASB at 877-705-4422.

We hope you'll find the handbook a helpful reference as you begin your school board service. Rely on the WASB for assistance at any time during your term. Contact us at 608-257-2622, 877-705-4422 or info@wasb.org, or visit our website at WASB.org.

Welcome Aboard!

Congratulations and welcome to the rewarding and challenging work of school board service. The WASB thanks you for your commitment to this important position to improve student achievement. The WASB works for you, focusing on supporting, promoting and advancing public education to enhance board governance through training and leadership.

Administrators, teachers and staff play a tremendous role in impacting student learning and success. They are in school every day working directly with students and their families. However, the school board's role in student achievement must not be overlooked. School boards are charged with the responsibility to create conditions that enable students to meet rigorous knowledge and performance standards.

Research shows that your commitment to school governance matters. And as Vince Lombardi said, "Individual commitment to a group effort – that is what makes a team work, a company work, a society work, a civilization work." Let me add that it is also what makes a school board work well together.

Thank you, again, for what you do on behalf of our students, our schools, educators and communities.

Sue Todey
WASB 2021 President
Sevastopol School Board

Advocates for Children

School boards and school board members are uniquely positioned to be advocates for boys and girls.

A member of a school board is entrusted with one of the most important responsibilities that can be assigned to any citizen – that of helping to direct the education of our youth. Wisconsin school board members are the elected representatives of their districts and set policy for the education of the district's children.

In Wisconsin, nearly 2,800 school board members are making decisions which affect more than 800,000 children enrolled in the public schools of the 421 districts in the state. As an individual board member, you generally have no more power or authority than any other citizen in the district. It is when you are meeting as a board that you can make decisions affecting the district.

There are many qualities important to school board membership, including:

- A commitment to the belief that all children are entitled to a beneficial educational program.
- An open mind and readiness to learn.
- A willingness to attend seminars and workshops to help you make intelligent decisions in school affairs.
- A vision and an ability to understand changes in our society.
- The ability to act with other school board members to advance the best interests of the school district.
- The capability to articulate the philosophy and goals of the school and to listen carefully to the criticisms offered by people with differing views.
- A willingness to invest the hours that will be necessary to faithfully discharge your duties.
- Freedom from conflict with any other interest.

Thank you for stepping forward to serve on your local school board, and please accept my sincere congratulations on your new role. We look forward to working with you.

John H. Ashley
Executive Director
Wisconsin Association of School Boards

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1 Beginning Your School Board Service

1:1 I've been elected. Now what?

Congratulations! You are ready to take office! You've joined the ranks of nearly 2,800 locally elected school board members in Wisconsin dedicated to helping our students succeed and ultimately become productive citizens. You hold positions as:

- An individual school board member;
- A member of a board made up of other members; and
- A member of the district leadership team composed of school board members, the superintendent and other administrators in the district.

As a school board member, you are a representative of the community and a leader of the district. You are a steward of your district's children and its tax dollars. You are an advocate of public education and an educated public.

To familiarize yourself with your district, use the [WASB What Every New School Board Member Needs to Know Guide](#) available on the WASB website.

1:2 When do I start?

Elected school board members take office, provided they have taken and filed the official oath, on the fourth Monday in April. (See sections [120.06\(4\)](#) and [120.42\(2\)](#) of the state statutes.)

For appointees, the school board should specify a date in connection with its appointment decision. A person selected to fill a vacancy, upon being notified of their selection, is deemed to have accepted the selection to the vacant board position unless he or she files a written refusal to serve within five days after notification. Assuming the appointee does not refuse to serve, the appointee must take and file the official (i.e., written) oath "on or prior to the day provided for taking office." (See section [120.06\(10\)](#) of the state statutes.)

Administration of oath: Don't forget to take the oath of office! Under state law, a newly elected or appointed school board member must take and file the official oath of office on or prior to the fourth

Monday in April. (See section [120.06\(4\)](#) of the state statutes.) This requirement also applies to an incumbent who is reelected to the school board. The school district clerk, a notary public or other authorized person may administer the oath of office. The forms are set out in section [19.01](#) of the state statutes. The official oath form ([EL-154](#)) can be found on the Wisconsin Elections Commission website.

1:3 What exactly do school boards do?

School boards lead and govern the schools and educational programs of our local, public school districts. That leadership role is performed as part of a team that includes the superintendent (also called the district administrator). The leadership team, in turn, operates within a unique framework of authority, duties and powers that are established by a variety of state and federal laws and supplemented by local policy decisions.

There are five types of public school districts in Wisconsin: K-12 common school districts, K-8 common school districts, union high school districts, unified school districts and first-class city districts (i.e. Milwaukee Public Schools). If you are not sure if your district is common or unified, ask your superintendent.

While the different types of school districts and their boards share many general characteristics, there are some differences in the specific powers and responsibilities that are assigned to them. All school districts and school boards are alike, however, in that student learning and student achievement constitute the centerpiece of their mission.

The National School Boards Association has identified five core functions of school boards that, when pursued with rigor and intent, demonstrate effective local leadership and correlate with high levels of student achievement. The NSBA calls this governance model the “[Key Work of School Boards](#),” and the WASB has adopted the model for use in connection with the [WASB’s board development programs and resources](#).

Keep in mind the school board’s job is to focus on the ends while the superintendent focuses on the ways and means to attain the ends. In other words, the board oversees the education of students and is responsible for school district operations, but does not directly run the district’s day-to-day operations.

1:4 What are some of the powers and duties of the board?

School board and school board member roles and responsibilities are determined by state and federal law. These laws define what must be done and identify certain items which must be decided locally. Some of the major state laws that determine the powers and duties of the board are:

- [Section 120.12](#) enumerates a list of specific duties of a school board in common and union high school districts.

- [Section 120.13](#) enumerates a list of specific powers of a school board in common and union high school districts.
- [Section 120.10](#) enumerates a list of specific powers of an annual meeting (which, for unified school districts, are powers of the school board).
- [Section 120.44\(2\)](#) gives unified school districts the powers and duties of the common school board and annual meeting.
- Other statutes (particularly in chapters [118](#), [120](#) and [121](#)) create other powers and duties. In addition, Chapter [119](#) has provisions that exclusively cover the Milwaukee Public Schools.

1:5 What does the [Key Work of School Boards](#) governance model cover?

The NSBA's Key Work model focuses on five areas that provide a comprehensive overview of a school board's critical governance responsibilities.

Vision: Effective school boards establish a clear vision and set high expectations for teaching and learning in a manner that supports strong student outcomes. The leadership team's vision supports and guides the development of a strategic plan and district goals. Effective boards formulate budgets and allocate resources in a manner that is aligned with the district's vision, strategic priorities and goals.

Accountability: Accountability means measuring and judging how well the district is putting the vision into practice and making progress on key goals. Accountability starts with (1) the adoption of goals and academic and other standards, and (2) the assignment of responsibility and authority.

Data and other assessments are used as tools. Success is acknowledged and rewarded while any lack of success, drives change and improvement efforts. School boards and individual board members also must be accountable, including by modeling desired behaviors and by establishing standards for and evaluating the board's own internal operations and performance.

Policy: By establishing policies, a school board exercises its collective authority in order to serve students and achieve goals. Policies translate the board's vision into action and should be closely linked to (and sometimes directly establish) accountability structures and processes.

While many policies are written statements that establish and provide direction for staff, students, programs and operations, the school district budget can be viewed as one type of policy decision. The scope and substance of a board's policies also reflect and contribute to the ongoing evolution of the board-administrator relationship, including by embodying an understanding of the respective roles of the members of the leadership team.

The Board-Administrator Relationship: Research has shown that the board-administrator relationship is critical to the success of a school district. Both the school board and the superintendent have essential leadership roles that are interconnected but different. In simplistic terms, and keeping in mind that close collaboration is needed, the school board has the final authority to determine what needs to happen, and the superintendent and staff are given a degree of leeway to determine how to make it happen.

In order for the members of the leadership team to have a productive relationship that promotes public confidence in the school district, individual members of the team must understand the unique roles and responsibilities of their position. Shared goals and clear policies can help to define roles and build a strong, collaborative relationship.

In nearly all districts, issues will arise that will cause the leadership team to discuss and recalibrate their mutual understandings of their respective roles. However, effective leadership teams are consistently professional, fair and objective, honest and open, team-oriented, prepared, and respectful.

Community Leadership and Advocacy: Community leadership is demonstrated when a school board and its members act as ambassadors and advocates for district interests. Effective school boards engage the community in an ongoing conversation that is composed of a variety of communication channels and opportunities for participation and interaction. A school district's public advocacy and community engagement initiatives can provide both formal and informal opportunities to identify and discuss information, ideas, needs and challenges with a variety of stakeholders.

School boards also have to forge relationships and work closely with legislators on legislative proposals that affect education, school funding and a variety of other issues. School board members have a prominent role to play in telling their school district's story and in listening to stakeholders. Such communication can help to build support for the district and its students.

More detailed information on the leadership role of school boards and individual board members, as well as information on their powers, duties, and authority is available from the [WASB](#).

1:6 Now that I'm a board member, what does my community expect of me?

As a new board member, you are expected to make decisions on major issues that affect the students and citizens of your community. As with every new job, it takes time to learn the ropes. You need to take time to learn about your job and the issues while performing your job. Some of the activities you will be expected to do are: attend board meetings, participate on committees, attend school functions, keep yourself informed about issues, pursue professional development opportunities for yourself and your school board, and interact with your fellow board members and the superintendent. These activities require a significant amount of time, but it is time extremely well spent when you consider that you are helping to shape the future of the children in your community.

1:7 I'm overwhelmed. How do I learn my job?

With help from your fellow board members, the superintendent, administrative staff and the WASB. The WASB offers an array of [services](#), [training](#) and [resources](#) that address current and emerging local needs including innovative training and leadership activities.

The WASB team of experts range in skills from [advocacy](#), [communications](#), [leadership development and board governance](#), [legal](#) and [policy](#). Please review the [WASB At Your Service](#) brochure for an overview of services and products. The WASB can customize a response to a district's unique needs and requirements.

Most importantly, don't hesitate to ask questions. Nobody expects you to have all the answers, and your colleagues and superintendent welcome the opportunity to get you up to speed.

1:8 How much time can I expect to spend on school board responsibilities?

The time required to complete your school board responsibilities will most likely vary by time of year. It will depend on how many meetings are scheduled, which committees you serve on and what issues are going on in the district at the time. For example, if the district is going through a building project, hiring a superintendent or developing the school district budget, the time needed for board meetings may be more extensive. On average, however, you can anticipate spending about 9-12 hours a month on board service.

1:9 How do the school board's responsibilities differ from the superintendent's?

Administration's job is to run the district. The board's job is to make sure the district is run well. The school board is responsible for establishing goals, setting policy and overseeing resources for the school district. The superintendent works for the school board and translates the policy into action. Consistent with the goals established by the school board, the superintendent and staff make the day-to-day decisions that affect the operation of the school district, deploying board-approved resources, assigning staff and documenting results.

1:10 Where, or who, do I go to for information?

The board president and/or superintendent usually can answer your questions on protocol or procedure as well as issues facing the board. Other board members, both current and past, may also be good resources, but be aware of Open Meetings Law issues with such conversations (see question 2:5). The WASB is also a good source for information and advice and has staff ready to answer your questions. Visit WASB's website, [WASB.org](#), for in-depth information on many [legislative](#), [governance](#), [legal](#) and [policy](#) issues.

1:11 Are school boards required to have [officers](#)? What are their duties?

Yes. If the board of a common or union high school district has more than three members, it must elect a president, vice president, treasurer and clerk each year. (See section [120.05\(1\)\(c\) of the state statutes.](#))

The school board of a unified school district must elect a school district president, vice president, clerk and treasurer from among its members, and a school board secretary who need not be a member of the school board. (See section [120.43\(1\)](#) of the state statutes.) The election of officers shall occur on or within 30 days after the fourth Monday in April. (See sections [120.05\(1\)\(c\)](#) and [120.43\(1\)](#) of the state statutes.)

Wisconsin statutes outline the basic duties of school board officers. For example, see sections [120.15-120.17](#) (e.g., “School district president; duties”). Please note that many other statutes come into play. In addition, local board policy can assign additional responsibilities and provide additional guidance to the board’s officers, but policy cannot conflict with the statutes (i.e., district policy cannot be used to “opt out” of mandatory legal duties).

1:12 How do I translate all the educational jargon and acronyms I hear at each board meeting?

There are a lot of abbreviations and acronyms for educational terms. This handbook includes a glossary of common education terms as well as a list of commonly used acronyms you may encounter throughout your school board service (see Chapters 9-11). For jargon or acronyms that are not included here, consider asking your superintendent or other board members.

When communicating with your constituents, attempt to avoid abbreviations and acronyms for educational terms so stakeholders can more easily comprehend district communications.

1:13 What is the board’s role when there are problems with an administrator, teacher or other staff person?

The only employee who answers directly to the school board is the superintendent. Accordingly, if there are concerns about the performance of another administrator, a teacher or other staff person that are unresolved after going through the appropriate steps of the chain of command, the board should raise these concerns with the superintendent in a properly posted closed session. It is the superintendent who has the responsibility to handle these issues. Take care not to cross the line into micromanaging the relationship with staff. It’s the superintendent’s job to lead and manage the employees in the district.

School boards may also have a review process established that enables board members to provide input to the superintendent regarding the other administrators. The superintendent may take collective input into account, but it is ultimately the superintendent who completes the final evaluation of the administrator. If there is a problem with the superintendent, on the other hand, the board needs to address the problem through the evaluation process or through informal feedback via the board president or the board as a whole.

2 Can We Talk?

2:1 Is it all right to call the superintendent?

You need to establish a productive working relationship with your superintendent. To do this, you need to talk to that individual. If you have questions, it is better to call the superintendent and discuss them before the board meeting rather than surprise the superintendent at a public meeting. If the questions are concerns or relate to negative feelings from the community, superintendents appreciate knowing about them in advance of the board meeting so they can come prepared to address them. It is appropriate to call the superintendent, set up a meeting to discuss questions, or send an email for simple questions or requests. When contacting the superintendent, it is important for a board member to keep the number and scope of such contacts within reason, to permit adequate time to receive a response, and to generally remain cognizant of the superintendents' other responsibilities and the other demands on their time.

2:2 If I disagree with board members or the superintendent, what is the best way to let them know how I feel?

Always treat your fellow board members, the superintendent and other administrators with respect. However, don't be afraid to disagree on an issue. In fact, a discussion about an issue that reflects two or more views usually results in a better decision than if everyone agrees with the first solution offered. Be certain you debate the issue, not the person, and maintain decorum in debate. [Demeaning comments or angry discussions do not facilitate effective decision making.](#)

2:3 How do I approach my superintendent or board if I have a suggestion for a change?

If your suggestion needs to be discussed by the entire board and voted on, it should be added to an upcoming board [agenda](#). Review your district policy on agenda setting to understand how to do this. Contact the superintendent or the board president to discuss your idea and have it either put on the agenda or referred to the appropriate committee for consideration.

2:4 Is it all right to talk to district administrators and staff?

In addition to the superintendent, you will come in contact with district employees, including administrators, teachers and other staff members. While there's nothing wrong with talking to district staff, keep in mind that [complaints should follow the chain of command](#). For example, teachers report to principals; principals report to the superintendent; the superintendent reports to the board. If you have a request for information, you should generally direct the request through the superintendent unless the superintendent or the board indicates otherwise. Keep in mind that individual board members generally do not have authority to direct the work of district staff members or demand that a staff member

prioritize the board member's requests over other work duties. In addition, district staff generally are not obligated to create new records or produce a new report or analysis in response to interest that has been expressed only by an individual board member. Directing requests through the superintendent can assist with appropriate prioritization, identifying information that may be readily available, and determining when it may be appropriate to have the full board weigh in regarding certain requests and project ideas.

In addition, individual board members may request and obtain records, statistics and reports, as directed by the board, as required by their office (i.e. president, clerk or treasurer), as available to them as a parent/guardian, or as available to them pursuant to a public records or directory data request.

2:5 Can I talk to board members outside the board meeting?

All board members have an obligation to ensure they do not violate the [Wisconsin Open Meetings Law](#) when participating in activities that pertain to school-related business. Board members must also be careful to avoid creating a walking quorum, which is defined by the [Wisconsin Attorney General](#) as:

- Any series of communications among members of the board;
- Who agree, tacitly or explicitly, to act uniformly; and
- In sufficient number to determine the board's course of action on any matter.

(See additional [Open Meetings Law Resources](#), including electronic communications (or other technology-facilitated activities), on the WASB website.)

“The essential feature of a ‘walking quorum’ is the element of agreement among members of a body to act uniformly in sufficient numbers to reach a quorum. Responding to a scheduling matter regarding one’s availability for a board meeting will not create a walking quorum. Also, merely expressing one’s support for the inclusion of a proposed agenda item or for holding a special meeting will not create a walking quorum provided that the board members have not engaged in substantive discussion or agreed on a course of action regarding the proposed subject matter.

“Where there is no such express or tacit agreement, exchanges among separate groups of members may take place without violating the Open Meetings Law. The signing, by members of a body, of a document asking that a subject be placed on the agenda of an upcoming meeting thus does not constitute a ‘walking quorum’ where the signers have not engaged in substantive discussion or agreed on a uniform course of action regarding the proposed subject. In contrast, where a majority of members of a body sign a document that expressly commits them to a future course of action, a court could find a walking quorum violation.” (See [Wisconsin Open Meetings Law Compliance Guide](#).)

2:6 What can I say, or not say, to parents and friends about school issues?

School board business that is discussed in closed session or relates to confidential matters (such as an employee personnel or student discipline issue) should never be discussed with anyone other than another board member or the superintendent. A good rule of thumb is to discuss only items that have been made public at a school board meeting. Adhering to this rule of thumb will go a long way in maintaining trust with the superintendent and the other board members and protecting staff and the public.

2:7 What information is considered confidential? When can a [closed session](#) of the board be held?

Many [employee personnel issues](#) and most information contained in [student educational records](#) are considered confidential and not subject to disclosure. Also, the information discussed in a closed board meeting is most likely confidential.

A school board is expected to conduct all its business in open session, unless a statutory exemption allowing the board to convene in closed session applies. The appropriateness of scheduling a closed session meeting of the board should be judged based on an analysis of each item of business proposed for the closed session. A closed session may be held only if the reason for such a session falls within one of the specific exemptions outlined in section [19.85\(1\)](#) of the state statutes.

In order for a school board to convene in closed session, a motion must first be made in open session and carried by a majority vote of the board in such a manner that the votes of each member are ascertained and recorded in the minutes. The chief presiding officer is required to announce to those present at the meeting the nature of the business to be considered in closed session and the specific statutory exemption(s) authorizing the closed session. The meeting notice and the presiding officer's announcement should describe the specific subject matter that is proposed for consideration in the closed session. Merely identifying the number of the applicable statutory section(s) and quoting the language of the entire exemption is unlikely to be adequate. The minutes must reflect this announcement. No business may be taken up at any closed session except that which relates to matters contained in the chief presiding officer's announcement of the closed session.

One of the main purposes of the announcement and motion requirements for convening in closed session is to ensure that each board member who is present at the meeting makes an informed decision as to whether to support the motion and/or whether to attend and participate in the closed session. This is important because a member of a governmental body may be subject to a forfeiture for violations of the Open Meetings Law.

However, members of a governmental body are not liable under the Open Meetings Law on account of their attendance at a meeting held in violation of the Open Meetings Law if they make or vote in favor

of a motion to prevent the violation from occurring, or if, before the violation occurs, their votes on all relevant motions were inconsistent with all those circumstances which cause the violation.

Also, note that an intent to reconvene in open session within 12 hours after a closed session must be noticed at the same time and in the same manner as notice of the meeting convened prior to the closed session. (See section [19.85\(2\)](#) of the state statutes.)

In general, the Open Meetings Law gives wide discretion to a school board to admit into a closed session anyone whose presence the board determines is necessary for the consideration of the matter that is the subject of the meeting.

2:8 I have children in school. How can I talk with their teachers now that I'm on the school board?

This can be a tricky area. No matter what you say about “speaking as a parent, not a board member,” it may be difficult for some teachers to separate your role on the school board from your role as a parent. It's not surprising that some teachers may be somewhat intimidated by your role as a board member. Some married board members have indicated that their spouses frequently take the lead in speaking to their children's teachers.

Make sure you're not using your position as a school board member to secure special treatment for your child. Your child should be treated the same as other students and be subject to the same rules and requirements. If there are issues you wish to discuss with a teacher, you should follow the normal procedures for contacting your child's teacher to discuss them.

Keep in mind that you do not relinquish your parental rights now that you're a school board member. You are always a parent first and a board member second.

2:9 As a board member, may I visit the schools?

You have the [same right](#) as a parent or community member to visit the schools in your district as long as you follow whatever procedures your district has for visitors. As a school board member, you may also visit the schools in an official capacity with the board's authority or to fulfill a specific duty required of you as a board officer.

As a school board member, you should use school visits to build good working relations with building principals and staff, to celebrate the positive accomplishments of the schools, and to show your pride as a member of the board. Look for opportunities to visit when a school is hosting a special event or recognition program for students and staff. In any event, be sure to tell the superintendent and/or principal in advance of your visit.

For individual requests to visit schools that were not approved or directed by the board as a whole, an individual board member should be sure to remain respectful of the administration's judgment regarding possible disruption and the most appropriate times and settings for board member visits. In addition, board members need to be sure that their purpose in conducting a school visit is appropriate. For example, seeking to visit a classroom to personally evaluate a teacher's job performance after hearing a complaint is not the role of an individual board member.

2:10 How do I respond to a community that questions the school board's decisions?

It's normal to hear questions about the board's decisions. You will at times find yourself dealing with controversial, complex issues, and the board's final decisions may be unpopular. Explain the thought process that went into the decision and why the board arrived at the conclusion it did, even if you personally disagreed. Be sure to answer honestly and in a straightforward manner. One of your roles as a school board member is to be an advocate for the district. Being asked about board decisions provides an opportunity to promote the positive activities that are occurring in your schools while at the same time responding to community questions.

2:11 How do I respond to questions from the media?

Your board has probably already adopted, at least informally, a policy for responding to the media.

Individual board members should be free to explain their votes or comments they may have made at a public meeting. If you are contacted by a local reporter and you're not prepared or don't have the relevant information, don't say, "No comment." Instead, tell the reporter you'll get an answer and get back to them or refer the reporter to the appropriate person in the organization who can respond to the reporter's questions. Ask what kind of deadline they have, and then promptly follow through.

In all situations, be honest — never lie! Talk in plain English, in short, quotable sentences, but stay on message. Answer the question that was asked if you can. Don't feel compelled to offer more information than needed to answer the question. Be friendly and warm. If you are on camera, remember that body language is as important as what you say.

When individual board members interact with the media or make other public statements about school-related matters, it is often important to expressly clarify that they are speaking only as individual board members and not on behalf of the entire board or on behalf of the school district. Also, with respect to some issues, it is not unusual for individual board members to be advised, or to conclude on their own, that commenting as an individual board member would be inappropriate or premature. In such situations, a board member may instead defer to a designated district spokesperson or emphasize that they intend to work with the leadership team as appropriate to address the specific issue.

Particularly on issues of great sensitivity or in response to a crisis, a single spokesperson — usually the board president or superintendent — should be designated to speak for the board and the district respectively in order to ensure that accurate information is provided and there are no conflicting messages. Be aware of federal student privacy laws as well to ensure that no confidential information is released.

If the media is waiting to do an interview following a board meeting, it is appropriate to refer the question to the president or the superintendent.

2:12 How should I respond to parental or staff complaints?

First, be familiar with your board policy on [public complaints](#). The best way to respond to parental complaints is to be a good listener and be familiar with the district's chain-of-command protocols. This allows you to ask questions to understand the situation better. Be careful, though, that the parent or staff person does not interpret your questions or comments as an indication of future board action.

Once parents or staff persons have shared their complaints with you, try to give them guidance on how to get their concerns addressed through proper channels, perhaps by referring them to the applicable person in the school district or to the appropriate complaint policy.

It's safe to say that most of the complaints you'll hear are administrative in nature and not policy issues. As such, they don't belong on the board's table. It is not your responsibility to solve each parent's or staff person's problem. By all means listen to them, but then make sure they know to contact the school staff to have their concerns addressed. You owe the superintendent and staff the opportunity to respond and to support them if they are properly following board policy.

2:13 Can I use [email or social media to communicate with my board colleagues](#)?

The [Wisconsin Attorney General's Office](#) strongly discourages the members of every governmental body from using electronic mail to communicate with each other about issues within the body's realm of authority except for procedural elements relating to creating the agenda or establishing meeting dates and locations (see question 2:5).

That being said, school board members may use email to communicate with each other if they are not using it to discuss board business or influence votes on issues in advance of a meeting or as a means of avoiding Open Meetings Law requirements. The same holds true with social media, such as Facebook, LinkedIn or Twitter.

Also, it can be important to differentiate between using email as an efficient method of delivering a one-way communication of information to all board members versus using email to conduct an electronic conversation or discussion that involves multiple board members and a substantive topic of

board or district business. The former is much less of a concern than the latter. It is not uncommon for a superintendent or board president to use email to provide all board members with notice of an important matter or to convey a useful resource or other background information — often expressly cautioning the recipients not to “reply all” or otherwise start an electronic discussion.

It is also generally permissible for one board member to email or “direct message” another board member with a question or with a response to such a question. However, even such one-to-one communications can create record management issues, and the members of small school boards or committees (e.g., with only three or five members) must take special care to evaluate whether they could potentially be creating a quorum or negative quorum through such communications. A negative quorum means enough board members to defeat a particular action. As previously mentioned, all school board members must avoid contributing to a series of sequential communications that may constitute a walking quorum.

Aside from possible violations of the Open Meetings Law, electronic conversations that involve multiple board members and that address substantive topics of board business may sometimes be criticized as secretive or nontransparent practices. This is because such communications are likely to affect the board’s discussion at the meeting and can preclude the community from hearing the board debate important issues.

Be forewarned, if you are using a school email address, essentially all of the emails within the account can be requested by the public or media under the [Public Records Law](#) (additional resources are available on the [WASB](#) website). If you are using a private email address for school related matters, all emails related to school business can be requested under the Public Records Law, even if such emails are contained on a private network or server.

Because school district email systems are generally structured to facilitate compliance with the Public Records Law, most school board members will want to be in the habit of using a district-issued email account for all of their board-related email communications. And, if a board member receives an email at a personal or work-related email address, a recommended practice is to forward the email to the board member’s school district email account and respond, if necessary, from the district account.

As further addressed in the resources listed herein, the public records issues related to email extend to other types of electronic records as well (such as social media posts, text messages, etc.). Please note that your other online communications may also become public as well, even with privacy settings set to “friends only.” If you don’t want your conversations and comments to become front-page fodder, don’t have them online.

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3 Time for Meetings

3:1 [What should I expect at my first board meeting?](#)

If you have never participated in a board meeting, you may be overwhelmed at first. There are [basic rules of parliamentary procedure](#) that should be followed, but each board operates in its own way. Ask for an orientation if one isn't scheduled.

There will be a meeting agenda and protocol. Talk with the board president before attending your first meeting to ask basic questions such as:

- Where should I sit?
- How is the agenda set up?
- How long do the meetings usually take?
- When should I speak?

You should also receive your board packet containing the agenda and any supporting information several days before the meeting although sometimes items are added to the agenda 24 hours or more prior to the meeting if a specific need necessitates such an addition. Be sure to go through the material carefully and take the time to call the superintendent or board president to ask questions about anything you don't understand.

Remember, this is a meeting of the school board. Staff and community members are invited to attend and participate either through a [public comment period](#) or as posted on your agenda. But this is your board's opportunity to conduct business. As such, the board should remain in control of the meeting at all times.

3:2 **Where should I sit?**

Many boards have their rooms set up in a consistent configuration for board meetings with name plates for each person at the table. Some boards have assigned seats that do not change from meeting to meeting. Other boards mix the seats up each time. And others do not have name tags or assigned seats and may alter the meeting room configuration depending upon the focus of the meeting.

To feel comfortable prior to attending your first meeting, you may want to contact the board president and ask if there are any "traditions" that you should know about in advance of the meeting, including where you should sit.

3:3 What is considered an acceptable dress code at board meetings?

Your board decides how formal or informal the meeting should be. A good rule of thumb, though, is to dress appropriately for a business meeting, as board meetings are business meetings. Remember also that the public may attend as well as the media. Your dress should reflect the professional approach that your school board takes in overseeing the operations of the school.

3:4 How does being on TV or having your meeting live streamed affect board members?

Any time you are being filmed or are in the public eye, it is normal to be more self-conscious and nervous. Some, but not all, boards broadcast live or tape their meetings for later broadcast on a local cable access station or through the district's website. Naturally, the first time you participate in a recorded or televised board meeting you may find that you are less articulate and forget some of what you want to say. After you attend a few meetings, though, you should become comfortable and even forget the camera is on. Periodically reviewing the video recording to see how the board is presenting itself is a good idea. Board members are often surprised by their unconscious body language that may or may not accurately communicate their feelings.

3:5 How professionally must a board meeting be run? What is considered too lax or too formal?

All board meetings need to follow some set of "[rules of order](#)," often based on parliamentary procedure. The method that your board selects should be identified in a policy. Some boards elect to follow Robert's Rules of Order (as it applies to the meetings of small bodies, rather than large assemblies) while others prefer a more basic version of parliamentary procedure. Your school board can generally be as relaxed or as formal as it chooses (e.g., in the method used to conduct discussion at a meeting, as to whether the board requires motions to be seconded, etc.) as long as the board's meeting procedures are consistent with the board's own policies and with any applicable legal requirements. For example, a board's rules of order and other meeting procedures must not violate the requirements of the Open Meetings Law. In addition, state law requires school boards to capture certain information about their motions, resolutions and votes in the minutes and written proceedings of their meetings.

To further illustrate the point that any local rules of order must yield to the requirements of state law, there are several instances where state law establishes a special voting requirement for the board to take particular actions. Normally, a school board can approve a motion or take other official action if the action is approved by a standard majority vote. When at least a quorum of the board is present and participates in the vote, a standard majority means a majority of the actual votes that were cast. Examples of special statutory voting requirements that deviate from the normal rule can be found in section [118.22\(2\)](#) of the state statutes (requiring a majority vote of the full membership of the school board to employ or dismiss a teacher who holds a contract under that statute) and in section [65.90\(5\)\(a\)](#) (requiring a two-thirds vote of the entire membership of the board to change the appropriations stated in the approved annual district budget). Boards must be careful to observe all such special voting requirements.

As a final example, because the school board president is, first and foremost, an elected member of the school board, the board president has the same voting rights and duties as all other board members, notwithstanding that under some applications of Robert's Rules of Order the presiding officer of a meeting would only vote in the case of a tie.

3:6 How often does my board meet?

School boards are required to hold a regular board meeting at least once each month at a time and place determined by the school board, according to sections [120.11\(1\)](#) and [120.43\(2\)](#) of the state statutes. School boards may choose to have more than one regular board meeting each month as a matter of local policy or by any decision of the board.

Aside from the meetings that are approved or scheduled by a policy or other decision of the school board, state law also establishes procedures for calling additional, special meetings of the board. The procedures for calling a special meeting are different for different types of school districts. In common and union high school districts, the procedures are found in section [120.11\(2\)](#) of the state statutes. In unified districts, the procedures are set forth in section [120.43\(2\)](#). Contact your district's superintendent or board president if you have questions about holding special meetings in your district.

3:7 What are the legal requirements for school board meetings?

School boards must meet in compliance with the [Open Meetings Law](#) and make public records available consistent with the [Public Records Law](#). Basically, the Open Meetings Law requires that all school board meetings, including most committee meetings, be open and accessible to the public. [Proper notice](#) must be given to announce regularly scheduled meetings as well as special meetings. [Minutes](#) of the meetings must be taken and include specific information required by state law.

3:8 What is the Open Meetings Law premised upon?

The Wisconsin [Open Meetings Law](#) is premised on the following beliefs:

In recognition of the fact that a representative government of the American type is dependent upon an informed electorate, it is declared to be the policy of this state that the public is entitled to the fullest and most complete information regarding the affairs of government as is compatible with the conduct of governmental business. (See section [19.81\(1\)](#) of the state statutes.)

An understanding of the basics of the Open Meetings Law is necessary in order to be an effective school board member.

3:9 How many board members can get together outside of a noticed meeting and discuss a school district issue or an upcoming agenda item without violating the Wisconsin Open Meetings Law?

This question implicates what is known as the “numbers test” for determining whether a “meeting” is occurring for purposes of the Open Meetings Law. The general rule of thumb is that participation in such a discussion is limited to a group that is less than the number of board members that could determine the outcome of a board decision that is related to whatever topic is discussed (even if there are currently no specific plans to make any decisions on the topic). In some situations, this will be less than a quorum or majority of the board, such as when less than the full membership of the board will be voting on a matter (e.g., due to an unfilled vacancy) or when a decision requires a two-thirds vote of the board in order to pass.

In practical terms, this means that the larger the total membership of the school board (e.g., 7, 9, or 11 members) the greater the freedom that any two board members generally have to discuss a school district issue between just the two of them. Five-member boards need to be substantially more cautious, and three-member boards have essentially no freedom to engage in such discussions.

Keep in mind that the same concepts apply to school board committees and to the members of a committee – which can be challenging at times. Also, it is important to be aware that “meetings” are not confined to in-person gatherings (e.g., electronic communications can also sometimes be considered a convening of board members). Board members also need to be aware of the rule that prohibits “walking quorums” (see question 2:5). (The Attorney General’s [Open Meetings Law Compliance Guide](#).)

3:10 How can a board have thorough exploratory discussions given the restrictions of the Open Meetings Law?

The Open Meetings Law does not preclude thorough exploratory discussions. You may find it awkward to talk about some topics openly, but the board is obligated to conduct all discussions in open session except during the limited and narrow situations that permit [closed](#) sessions.

3:11 [Can board members meet socially or as a group at training conferences without violating the Open Meetings Law?](#)

Yes. Social gatherings and [conferences](#), including attendance at the [WASB/WASDA/WASBO Joint State Education Convention](#), are not considered school board meetings, even if a quorum is present, as long as the board members in attendance do not discuss school business or arrive at decisions about an issue.

3:12 How specific do agenda items need to be when giving notice of a school board meeting under the Wisconsin Open Meetings Law?

This is an important question because all board members have a responsibility to adhere to the Open Meetings Law, regardless of whether they had a direct role in preparing or issuing the public notice of the meeting. If a topic is not properly noticed and the school board addresses the topic during a meeting, each board member participating in the meeting could be found to have violated the law. In terms of what the law actually requires, the question of specificity is governed by a case-by-case “reasonableness” standard.

Under the standard, whether notice is sufficiently specific will depend upon factors such as the burden of providing more detailed notice, whether the subject is of particular public interest, and whether the topic involves non-routine action that the public would be unlikely to anticipate. As an example, if the public notice of a meeting mentions only “facilities planning,” that would almost certainly not be specific enough notice if the real issue to be addressed is a decision to permanently close one of the district’s elementary schools. Closing a school is not routine business and would be of high public interest. Generic subject matter such as “new business” is also insufficient. According to guidance provided by the Office of the Attorney General, “In order to draft a meeting notice that complies with the reasonableness standard, a good rule of thumb will be to ask whether a person interested in a specific subject would be aware, upon reading the notice, that the subject might be discussed.”

As a closely related issue, there are additional standards that govern notices of closed sessions. Although it is true that every closed session must appropriately fall under one of the statutory exemptions that allow a closed session, identifying the applicable statutory exemption, by itself, is not sufficient notice of the subject matter of a closed session. The Attorney General’s Open Meetings Law Compliance Guide advises as follows: “Notice of closed sessions must contain the specific nature of the business, as well as the exemption(s) under which the chief presiding officer believes a closed session is authorized. Merely identifying and quoting from a statutory exemption does not reasonably identify any particular subject that might be taken up thereunder and thus is not adequate notice of a closed session.”

3:13 What role does the superintendent play at school board meetings?

The superintendent is a key person at all school board meetings. The superintendent and president commonly plan the meeting agenda together. The superintendent makes certain the meeting room is set up as required and all tools that are needed are available, such as audio or visual recording equipment, smart board, internet access, network access, easel, projector, microphone, etc. Each item on the agenda is introduced by the president; however, for discussion or action items, the superintendent or a designee is often asked to explain the issue. The superintendent’s opinion or recommendation should be solicited before a vote is taken.

3:14 How do I get involved in board committees?

State law does not require the use of standing or special-purpose committees. The use of such committees is a matter of local policy and left to the discretion of school boards.

There are circumstances, however, where school boards are required to appoint a committee or group of individuals to advise the school board on specific matters of school district interest or concern. For example, school boards are required by section [118.019](#) of the state statutes to appoint a committee to advise the board on human growth and development instruction.

Similarly, the federal law governing school nutrition programs requires school boards to develop school wellness policies with the involvement of the school board, school administrators, school food service representatives, physical education teachers, school health professionals, students, parents and the public.

The breadth of committees, the composition of board committees and how committee members and chairs are appointed is a matter of local policy. In some Wisconsin school districts, board committees are comprised of board members only (i.e., subunits) and in some cases they consist of a variety of people as deemed appropriate given the issue the committee is charged to study.

3:15 Who is responsible for setting the [agenda](#)?

The superintendent and board president are responsible for setting the agenda according to most boards' policies. It is helpful to familiarize yourself with the policy on agenda setting in your district.

3:16 How can I get my issues onto the board [agenda](#)?

The best way to get an item onto the board agenda is to follow your board policy and protocols — usually by contacting the board president, or in some districts by contacting either the board president or superintendent, prior to the posting of a meeting. In some districts, the board may set aside a portion of its regular meetings for the identification of future agenda topics.

Be prepared to be patient with your agenda requests. The need to prioritize the board's work and ensure that the leadership team is adequately prepared to address a topic can sometimes mean that it can take a while to go from an initial suggestion to an actual agenda item. If only one or two board members have any interest in pursuing an issue, it might even mean that the school board never takes up the issue in a substantive manner.

If you feel as though the normal process for establishing meeting agendas is not giving an issue that is important to you a fair chance, consider asking for an upcoming meeting to include an agenda setting topic where the board as a whole will be asked to decide only whether the issue should be taken up in

a substantive manner at a future board meeting. If, at that point, the board does not vote in favor of including the issue on a future agenda, the board's decision regarding its current priorities should be respected.

3:17 Does [public comment](#) only pertain to agenda items?

Although school board meetings must be open to the public, there is no requirement that the public be allowed to speak and participate in the school board meeting. This decision is left up to the individual board if it wants a public comment period. If the board decides to allow public comment, as most do, it may set rules that restrict at what school board meetings (regular and/or special) public comment will be taken, topics that can be addressed (agenda only or all topics), the total amount of time for the public comment period and the duration of each presentation.

For more information on [public comment](#) periods, see the [Open Meetings Law](#) Compliance Guide from the Department of Justice and the April 2010 [WASB Legal Comment](#) by Boardman and Clark available on the WASB website.

3:18 What if a member of the public complains at a board meeting?

The grocery store isn't the only place board members will hear complaints. If an individual raises a complaint during a board-established public comment period, it's best to listen to the individual and then say that the board will take the issue under advisement and direct the concern to the appropriate person in the chain of command to respond to the constituent. You can expect the board president and/or superintendent to take control of this situation.

3:19 What is a consent agenda?

A consent agenda is an item listed on the regular agenda that groups several routine items under one agenda heading. Routine items (such as paying bills, approving minutes of the last meeting, etc.) can thus be approved by a single unified motion and vote of the board. The purpose of the consent agenda is to expedite business and streamline the meeting. There is normally no discussion of items on a consent agenda. However, any board member may request that any of the items within the consent agenda be removed from the group for individual discussion and a separate motion and vote.

3:20 Can I ask questions during the board meeting?

Absolutely! Hopefully, you have taken time to review your materials in your board packet and have asked for any clarifications from the superintendent or board president prior to the meeting. Certainly, as the discussion of an item ensues, other questions may occur to you that you have not previously asked.

3:21 How may I ask questions at a board meeting and still adhere to the “no surprises” rule?

If you think your question may be controversial, let the superintendent, the president or both know ahead of time. They can help you decide if there is a better way to address the issue. If your question is to clarify an issue or if it is prompted by the discussion, then it is appropriate to ask it at the board meeting as long as you don't broach topics properly discussed in closed session.

If you have a question that may require collecting data or information not already in your board packet, you might let the superintendent know prior to the meeting so that he or she can come prepared to answer your questions or bring the matter to the full board to determine if it would like to have the effort and time put into the response to those questions.

If your question is about a matter not included in the meeting notice, the resulting discussion may violate the Open Meetings Law requirement that the public receive notice of the matters discussed at the meeting.

3:22 How is [voting](#) done at a board meeting?

All votes taken at a school board meeting are a matter of public record and must be recorded in the minutes. Secret ballots are not permitted except in the election of board officers.

Section [19.88](#) of the state statutes requires all motions and roll call votes taken at meetings of a governmental body (e.g., a school board or a committee created by a school board) to be recorded. This applies to open and closed sessions of the meeting. A board member may require that a vote be taken in such a manner that the vote of each member is ascertained and recorded. As a result, if a board member makes such a request, the minutes must reflect the vote of each board member.

3:23 Do most school boards vote in a rotating order or consistent order, or doesn't it matter?

The manner in which your meeting is run is determined by your school board. How you vote — in a rotating order or the same order each time — doesn't matter as a legal matter. A rotating order allows for a different member of the board to be the first and last to vote. The Open Meetings Law simply requires that the public must be able to determine how each board member voted.

3:24 When does the board president vote?

The board president votes each time a vote is called. Some people think that the board president only votes to break a tie as the chair generally does under Robert's Rules of Order. This is not true. The board president is expected to vote as a member of the board in whatever sequence the board is following. Whether the vote is rotated each time or each member votes in the same sequence, the board president votes in the same way as the other board members.

3:25 Can a school board member vote by proxy at regular or special board meetings?

No, it is not permissible for a board member to vote by proxy. The Open Meetings Law requires that a governmental body take action on a motion only when that motion is voted on by a quorum of the members who sit on the governmental body at a lawfully convened meeting. There may be other specific voting requirements on specific items that have different voting requirements (see question 3:5).

Opinions of school attorneys can vary as to, for example, whether a board member participating in a meeting via teleconference or web/video conference should be counted in the quorum requirements, and whether it is appropriate to allow a board member to vote on a matter when the board member is not physically present.

Many school attorneys have taken the position that it is inadvisable for a school board to permit an individual board member, who is not physically present at a meeting, to participate in the discussion, deliberations or vote on any matter that involves an individual's due process rights or a quasi-judicial proceeding (e.g., expulsions, employee discipline, etc.). Concerns can also arise with allowing an individual board member to participate in a meeting remotely when the board has convened in closed session. (See the [March 2020 FOCUS](#) (if a subscriber) and [April 2017 WASB Legal Comment](#) on the WASB website for more information.)

3:26 Can I abstain from a vote?

There is no statutory requirement that a school board member vote on all motions that come before the board. However, there is a legislative policy that favors the accountability of public officials for their actions. Therefore, board members who routinely abstain from voting on school board business, may find that their actions/inactions constitute a breach of their responsibility to those who elected them.

School board members should be aware of any potential [conflicts of interest](#) that may exist (or the appearance thereof) and abstain from discussions or votes in such instances. As a general rule, school board members should abstain from discussions or votes on issues which involve a direct financial interest for the board member. School board members should keep in mind related state statutes including, for example, section [19.59](#) addressing ethical standards for local governmental officials and section [946.13](#) addressing private interests in public contracts.

3:27 What if I disagree with a board decision?

If you don't agree with a decision that the board has made, you may express your position for the record. But it is still your responsibility to support the board's final decision. The time to disagree is during the discussion and with your vote (which is in the public record). If you are asked about the decision, explain why the board voted the way that it did. You may say why and how you voted; however, you should not do it in a way that undermines the board's majority decision. As long as your comments remain factual

and do not evaluate the board action, you are showing support for the decision. You should also direct questions to the board's spokesperson if one has been assigned to that particular issue.

3:28 Can a board president offer motions?

Normally the board president calls for the motions on agenda items. The president is a member of the board with the same voting rights, no more and no less. It is permissible for the president to offer a motion.

4 Working With the Board

4:1 Should I ask for a mentor?

Many boards will have a designated person who mentors the new board member. Serving as mentor may be a defined responsibility for one of the officers, such as the vice president, or it may be a rotating position.

A mentor will orient the new board member prior to their first board meeting. The mentor will also check in with the new board member periodically during the year to explain key activities, such as the process for evaluating the superintendent or the budgeting process. If you find your board does not have a person designated as mentor, you might suggest it, particularly if you prefer working this way. In addition, the WASB has a [Peer Mentoring Program](#), which is a complimentary service for school board members — new and experienced. Whether you are new to the board, new to being a board officer or just would like an additional resource, WASB Peer Mentors are available for support.

4:2 When are issues serious enough to bring to the board?

You are the link between the school district and the community. You should be aware of issues confronting other districts that could become an issue in your district. You must also filter what you bring to the board for consideration to be sure it truly requires board attention. If you are hearing concerns from community members, you might want to bring that issue to the superintendent or board president first. An issue or activity that is counter to board policy should be brought to the attention of the president or the superintendent.

When in doubt, feel free to discuss concerns with the superintendent or, particularly if the school board has at least five members, the board president. They can help decide if the board needs to be proactive about a particular issue. Remember to be careful of “walking quorums” when having conversations with the board president or fellow board members. (See question 2:5 for more on “walking quorums.”)

4:3 What is the committee structure, function and role?

State law does not require the use of standing or special-purpose committees of the board itself. The use of such committees is a matter of local policy and left to the discretion of school boards. (See question 3:14 for examples of state- and federal-mandated committees.)

The composition of board committees and how committee members and chairs are appointed is a matter of local policy. Some boards operate as a committee of the whole where all issues or activities are addressed by the entire board together. Members of boards that choose this method generally receive the same information at the same time and have the authority to deliberate on each issue. Other boards function with a well-defined committee structure where board members serve on several committees, which first address issues or activities before they come to the full board.

Board members are appointed to standing committees by the president and serve one-year terms. Ad hoc committees or task forces can also be established to deal with a one-time issue, and their length of term is often less than one year. A task force is a good approach to invite staff and community members to offer their insights and/or special expertise on a particular issue.

The committee structure works best when the board fully trusts all the board members and is willing to accept the work and recommendation of this smaller subset of the board. This does not mean the full board cannot ask questions and become informed prior to voting on a motion at a board meeting; in fact, all need to become informed in order to vote responsibly. Rehashing the entire work of the committee, though, defeats the committee's purpose.

Boards that use a committee structure feel it saves time and allows each board member to delve more deeply into fewer areas. Some boards find they are able to deal with more issues with this approach and board meetings are more reasonable in length. Possible standing committees include policy, finance, curriculum, public information, students and athletics, buildings and grounds, and personnel. None of these committees are required by law.

Keep in mind that committees or task forces report to the board, not to the community or media. They should not take on life of their own. One last important point to be aware of is that, with very limited exceptions, formal committees are subject to the Open Meetings Law requirements even when there is no quorum of the full membership of the board.

4:4 How can I survive the politics?

Don't think of it as surviving politics; instead, view it as cultivating relationships. School governance is founded on the belief that a group of very different people representing various constituencies in their district can make better decisions than any one person alone. That diversity is the board's strength.

With this in mind, it's best to be open-minded about the opinions of your fellow board members. Your goal should not be to convert them to your point of view, but rather to determine the best solution to an issue by working together to try and accommodate all views. You want the students to be the "winners" — not one board member or another.

When you do not prevail in a non-unanimous decision, try to keep the perspective that reasonable minds can disagree as to the best approach to almost any school issue. Also, not every decision sets things in stone for all time. There may be an opportunity for the leadership team to revisit the issue at some point in the future.

4:5 How can I best assimilate into the team?

You may be joining a board with members who have been together for a number of years. As the “new kid on the block,” it will take time to become part of the team. Talk with your new colleagues. Respect their expertise. Listen and observe. Ask questions. Do your homework. Make recommendations.

4:6 How does a board assess whether it is working well as a team?

The WASB provides two [board assessment tools](#).

The first is a comprehensive [Annual Board Development Tool survey](#) developed in conjunction with School Perceptions, a Wisconsin-based survey company. Aligned to the Key Work of School Boards, the survey helps boards identify their areas of strength and alignment as well as where further dialogue and discussion is needed. The tool is complimentary for boards to use and each district can access its own results. Access codes are needed for the tool, which are distributed by the WASB each fall.

The board can request an analysis of its results from School Perceptions. For a fee, School Perceptions will provide the district with information on how the board compares to other boards which have used the survey tool that year. If requested, the WASB can provide an additional analysis that suggests next steps.

The second tool is the [WASB School Board Meeting Self-Evaluation Tool](#). It is a simple fillable pdf survey designed for boards to assess whether their meetings are running as effectively and efficiently as possible.

4:7 What should a board do when it is not working well as a team?

Open communication is critical to the proper functioning of your board. If you feel your board is not functioning well, it may be appropriate to suggest a [legal](#) and/or [governance](#) workshop where the board reviews its ground rules, board policies on board operations and board/administrative relations that establish how the leadership team will function. If these ground rules and policies are not effective, then consider modifications to them. Consider developing a specific set of [policies](#) that address board operational protocol, board code of conduct and board/administrator relations. You may want to hire a facilitator to assist your board in improving the board’s working relations. The WASB can help with a custom board retreat tailored to your board’s specific situation.

4:8 How do school boards make decisions?

School board members are trustees, responsible for a trust established with the community. When making decisions, the board should seek the advice, where appropriate, of the district’s administrators, teachers, employees, community members and experts such as the school district’s legal counsel, financial advisor or auditor. With this information, the board can act only during legally called board meetings. Therefore, it is important that board members do their “homework” prior to attending a board meeting so that they can discuss the issue and be prepared to take action at the meeting.

4:9 What is the most important consideration when making a decision?

The primary consideration is the tangible impact the decision will have on your district’s students. If you understand the facts and relevant data and you keep the needs of all students in mind when making decisions, you will undoubtedly make good decisions. Remember, your first responsibility is to every student in your district. Keeping this in mind will greatly assist you in making the right decisions despite pressures that certain constituent groups may exert.

4:10 What can or can’t school board members reveal to each other?

School board members will learn information that is confidential and should not be discussed outside of a board’s closed session with friends, family or other unauthorized individuals. This does not limit discussions among school board members at appropriate times in conformity with the Open Meetings Law. Board members should feel they can discuss issues among each other that are before and within the jurisdiction of the board.

4:11 When I’m in the minority on the board, how can I influence the other board members to consider my point of view?

Research the issue, use data, practice patience, disagree respectfully, and develop your skills. Genuinely listen to your colleagues. Don’t interrupt. Wait to be recognized, then make your point, but don’t deliver a monologue. Argue primarily from facts, not emotion. Concisely identify the problem or the potential opportunity. State your recommendation and explain how it helps attain a district goal. Finally, be prepared to compromise and do not actively undermine the board’s ultimate decision.

4:12 Should the school board set goals for itself each year?

Yes, it is a good idea for a board to have goals for the effectiveness and efficiency of board operations and evaluate them on a yearly basis. In this way, you have a scheduled forum for discussing the proficiency of your board and how to improve it.

4:13 Are there term limits for board members?

No. However, the opportunity to make a change on the board occurs annually during the school board election when community members can choose to run for seats on the board whose terms have expired or to fill the remaining term of a recent vacancy. A board with both new and seasoned members can provide the best of both worlds: new thinking is introduced while institutional history is maintained.

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5 Building a Relationship With the Superintendent

5:1 What is the role of the superintendent relative to the school board?

Consider the superintendent the chief executive officer of the school district who reports to the board of directors — the school board. The superintendent is the only employee who is employed and evaluated directly by the board. All other administrators, teachers and staff are hired by the superintendent, pending board approval. Teacher and administrator contracts must be approved by a majority vote of the full membership of the board. The board could delegate to administration the hiring of support staff personnel who are not required to have a contract underneath section [118.22](#) or section [118.24](#) of the state statutes, but the board-approved budget must fund these support staff positions.

While the school board is responsible for setting the vision and goals for the district, it is the superintendent who implements the policies to attain the goals the board sets. The school board tells the superintendent what it wants done; the superintendent determines the best way to do it. The superintendent is also the board's principal advisor — identifying operational needs and recommending policies for board action.

5:2 How do I communicate with the superintendent?

You should feel free to communicate in any way you are comfortable. Usually the superintendent is more than willing to meet with you, discuss issues on the phone or respond by email. The important thing is not how to communicate, but that you do communicate with the superintendent, especially when you have questions about agenda items being discussed at your board meeting. As mentioned earlier in this publication, when you do contact or ask to meet with the superintendent, try to remain cognizant of the superintendent's other responsibilities and the other demands on the superintendent's time.

5:3 When and how does the board evaluate the superintendent?

Section [121.02\(1\)\(q\)](#) of state statutes requires the board to evaluate the superintendent at the end of the superintendent's first year of employment and at least once every three years thereafter. The evaluation should be done according to procedures developed by the board in consultation with the superintendent.

Leadership assessment is an integral part of any school district progress assessment. An environment of continuous improvement requires a developmental approach to evaluation. Evaluation of the superintendent has not been established under the [Wisconsin Educator Effectiveness Model](#). However, school districts need to be ready and informed by setting a tone for executive leadership evaluation.

The superintendent's evaluation should be a comprehensive and objective review of their performance during the preceding year. The evaluation should be based on a consensus of the board's assessment of the superintendent's performance relative to the stated objectives for the position. The board should also consult the superintendent's contract to determine if it includes provisions related to evaluation.

The superintendent should be provided with a written copy of the board's evaluation and should discuss it with the board, most typically in closed session.

The WASB offers a [Superintendent Evaluation Framework](#) that recognizes the need for a collaborative development process to support the continuous growth of the superintendent. The evaluation should be used to foster this growth and to improve the overall leadership within the district. The WASB Framework includes evaluation requirements, key considerations, prompts and questions for the first-year superintendent, standards-based rubrics for the beyond-first-year superintendent, a sample performance narrative evaluation document, information about superintendent goals, a job description audit tool and sample artifacts.

[WASB consultants](#) can assist your school district in developing a superintendent evaluation system which complies with Wisconsin statutes, incorporates your job description, and builds on the concepts of continuous improvement.

5:4 As a new board member, how should I approach the superintendent about making a change without being overly aggressive?

You should feel free to contact the superintendent or the board president to discuss your idea and have it either put on the [agenda or referred to committee](#).

If you are tactful and ask thoughtful questions about the way the board currently operates and why, you won't be perceived as pushy. If your suggestion relates to district operations, you should first ask yourself if you are getting too involved in the management of the school district. Even so, if you do it tactfully, the superintendent will be willing to discuss how the school district functions and be open to new ideas.

5:5 How do I gain the respect of the superintendent and other administrators?

As with any relationship, you have to earn it. Respect the superintendent and other administrators. They're the education experts. Seek their advice. Listen to what they have to say. Ask thoughtful questions. Be open, honest and direct. Take time to learn about the school environment and issues that may be unique to your district prior to making suggestions and trying to effect change.

6 Basics of School Law and Budgeting

6:1 What are the powers and duties of school boards?

School board powers and duties are determined by state and federal law. These laws may define what must be done and they may identify what gets decided locally. Some of the major state laws that determine the powers and duties of the board are outlined in question 1:3.

6:2 What are the primary legal functions of school boards?

The school board in and of itself operates like the three branches of government. In its “legislative” function, the board makes policy and determines the budget and the tax levy. In its “judicial” function, the board serves as an impartial decision-maker in any “due process” hearings (expulsion, termination, etc.), finding facts, applying law/policy, reaching conclusions and issuing orders. In its “executive” function, the board serves as an employer by hiring, evaluating [the superintendent], and compensating employees.

6:3 What is the legal manner in which school boards make decisions?

School boards make decisions at properly posted school board meetings. Normally school boards require a simple majority vote of those present at the board meeting for motions to carry. School boards should keep in mind, however, that state law and/or board policy may include other voting requirements. For example, section [118.22\(2\)](#) of the state statutes requires a majority vote of the full membership of the school board to employ or dismiss a teacher who holds a contract under that statute, and section [65.90\(5\)\(a\)](#) of the state statutes requires a two-thirds vote of the entire membership of the board to change the appropriations stated in the budget. In case of a conflict between the board’s rules of order or policy with a state statute, the board must yield to the state statute.

6:4 What constitutes a conflict of interest on the part of school board members?

There are both statutory provisions and common law (i.e., court) decisions that address potential conflicts of interest and related ethical issues for school board members. The state statutes that may come into play include: sections [19.41-59](#) (the local government code of ethics and related liability), section [946.12](#) (misconduct in public office), and section [946.13](#) (prohibiting certain private interests in public contracts). Under the common law, school board members also need to be aware of additional conflict of interest concerns and the doctrine of incompatible offices. The restrictions established under these various sources of law extend beyond the receipt of improper monetary gains and address a variety of

situations where a board member may have divided loyalties or neglect or abuse their duties or authority. Some examples of the restrictions that apply to school board members are presented in this section.

One of several prohibitions established under section [19.59](#) of the state statutes is that local public officials may not use their public position or office to obtain financial gain or anything of substantial value for the private benefit of themselves or their immediate family, or for an organization with which they are associated. This statutory rule prohibits a board member from, for example, participating in any discussions or votes concerning the district's employment of or other business arrangements with the board member's spouse or, if there is a sufficient level of financial dependency, with any parent or child of the board member. (Under the common law, a board member may face conflict of interest scenarios that involve additional relatives of the board member.) The restrictions found in section [19.59](#) and in other areas of the law also dictate that board members must proceed with great caution in any dealings with vendors who might offer gifts of goods, entertainment, travel or meals. Conducting business in the public sector is very different from conducting business in the private sector.

Under section [946.13](#) of the state statutes, the general rule is that an employee or board member may not have a direct or indirect private pecuniary interest in contracts with the school district if those contracts involve receipts and disbursements of more than \$15,000 in any year. A violation of this requirement constitutes a felony. This is a "strict liability" statute, meaning that a person can be convicted under the statute regardless of their specific intent or any advance knowledge that their conduct was prohibited by the statute. Section [946.13](#) can be violated by actions taken either in a board member's private capacity (e.g., by bidding on or entering into a district contract for their personal business) or in a board member's public capacity (e.g., by participating in a decision to change a group insurance contract when the board member has coverage under the plan as a retiree from the district). Abstention from all board discussion/action on a contract does not necessarily cure this kind of conflict of interest. At best, abstention would address only the portion of the statute that restricts the board member's actions as an elected official, and it would still be possible for the board member to commit a violation in the board member's private capacity. Nonetheless, many school attorneys and WASB attorneys advise that non-participation in one's official capacity is a minimum step that a board member must take if, for example, the board member's spouse is seeking employment or some other business arrangement with the district.

Moreover, any time that a board member abstains from participating in a board discussion or board decision due to a known or potential conflict of interest, WASB attorneys and other school attorneys have further advised that it is best practice for the board member to physically leave the board room and have the minutes of the meeting expressly state that the affected board member was not present during that discussion or action. Again, depending upon the specific facts, taking these steps may not insulate the board member from all liability under the conflict of interest laws.

Abstention also does not solve issues with incompatible offices (i.e., two offices or positions that a board member cannot hold at the same time). For example, being a school board member is generally thought

to be legally incompatible with being a paid employee of the same school district in any capacity. When offices are incompatible, the person affected must choose one position or the other.

As mentioned earlier in this section, even if section [946.13](#) of the state statutes and the statutory [Code of Ethics](#) did not exist in Wisconsin, judicial decisions have developed a common law doctrine surrounding conflicts of interest. As explained in the [May 2013](#) WASB Legal Comment, “The long-established policy of the state is that public officers shall be free from any influence other than influence which comes from the obligations owed to the public. For school board members, this means that, as a general rule, no board members can vote on any question (or any contract) in which they have a direct, personal or financial interest. If a school board member votes on a matter in which he/she has a conflict of interest, a court is likely to set aside the school board member’s vote and/or allow a school board to declare the action void.” School boards should consult with their local school district legal counsel when these situations arise.

6:5 May school board members run for or hold an additional public office or position?

If a board member runs for or attempts to serve in another office or position, issues may arise under the doctrine of incompatibility of office and particular statutes or rules. (See [Article VII, section 10 \(1\) of the Wisconsin Constitution](#) and [Supreme Court Rule 60.06](#)).

Incompatibility of office is a common law doctrine (i.e., a judicial doctrine created by courts rather than a statute) that bars a person from holding two offices where one office is superior to the other such that the duties exercised under each might conflict to the detriment of the public, or where the nature and duties of two offices are such that public policy considerations bar one person from discharging the duties of both offices.

Incompatibility can arise in regard to an individual who is elected or appointed to two public offices that have overlapping terms of office. However, the most common application of “incompatibility of offices” in school districts is probably the notion that a board member cannot simultaneously hold a position of paid employment in the district. Opinions of the Wisconsin Attorney General and the former State Ethics Board suggest that holding even a relatively minor employment position (e.g., substitute teaching) can give rise to incompatibility concerns.

6:6 Are there any school district jobs that a school board member can hold while they are a board member? What about just occasional substitute teaching in the district?

In connection with serving on a school board, one example of an incompatible position is simultaneously being an employee of the same school district. The WASB is not aware of any court decisions or authoritative advisory opinions (e.g., from the Wisconsin Attorney General or the Wisconsin Ethics Commission) that have identified an exception for part-time employment, short-term employment, or substitute employment.

Even volunteering to perform responsibilities that are often performed by paid employees can raise “incompatibility” issues. In fact, as covered in question 6:7, a special statute was enacted to define conditions under which a current board member may serve as a volunteer coach or supervisor for student extracurricular activities. In the absence of the special statute, volunteer coaching may have been vulnerable to a determination of incompatibility.

6:7 Can school board members be coaches?

In 2015, the state Legislature enacted section [120.20](#) of the state statutes. Under that statute, a board member may serve as a volunteer coach or as a volunteer supervisor of an extracurricular activity if the school board member (1) does not receive compensation for such services; (2) agrees to abstain from voting on any issue that substantially and directly concerns the activity; and (3) completes a criminal background check procedure.

In the absence of the special statute, volunteer coaching by a current board member may have been vulnerable to a determination of incompatibility of office (see question 6:6). The authorization to volunteer that is provided by section [120.20](#) does not apply to roles other than coaching and supervising extracurricular activities. Finally, even though such volunteering is now expressly permitted by section [120.20](#), a school board could conclude that it prefers not to authorize current board members to serve as a volunteer in those roles.

6:8 Can a school board member be employed by a company that provides services to the school district? Can a board member be one of the employees that provides those contracted services — such as a bus driver or food service employee?

The short answer to the question of whether a school board member may be an employee of a company that provides services to the school district is, “It depends.” It depends, for example, on factors such as whether the board member (or his/her spouse) has any ownership interest in the company and (even where there is no ownership interest) on the board member’s exact role and duties. But, at one extreme, where the board member is employed in a capacity that has no direct or indirect connection to the contract between the company and the school district, it is likely that the employment itself does not create an issue. At the same time, there could be some school board decisions in which such a board member would not participate due to his/her outside employment.

The second part of the question, about being one of the employees who actually provides the contracted services to the district, also does not have an easy, one-size-fits-all answer. In the specific examples of being a bus driver for a private transportation company or a food service employee of a third-party food service contractor, one approach would be to try to avoid some of the potential issues by working with the third-party employer to obtain assignments with other customers.

If it is not practical to avoid the issues in that manner, a potential legal concern is the doctrine of

incompatible offices (see question 6:5). Although the WASB is not aware of any court decisions or authoritative advisory opinions that have determined that such third-party employment is either compatible or incompatible with serving as a board member, there is room to argue that the public policy reasons behind the doctrine could be applied to the situation. In addition, such a board member would have to be cautious in both his/her public capacity (as a board member) and his/her private capacity (as an employee of a private company) to avoid any conduct that would violate section [946.13](#) (a criminal statute that prohibits private financial interests in public contracts) or section [19.59](#) (the local government code of ethics). In short, these are situations that involve some legal risks and for which a board member may need to seek legal advice from his/her personal attorney.

6:9 What does a board member who has a family member employed by the school district need to be aware of? What are the differences between having a spouse employed by the district as compared to a child, parent, or other relative?

This question correctly anticipates that the conflicts-of-interest analysis changes based on the type of relationship. One of the primary reasons for the differences has to do with the extent to which the board member has (or does not have) a direct or indirect financial interest in the relative's employment or in a public contract that is closely related to the relative's employment. So, a spouse is an example of a relationship that creates the broadest array of restrictions on and potential legal consequences for a board member's conduct.

If the district-employed relative is an adult child of a board member with whom the board member no longer has any direct financial ties (e.g., the child is no longer on his/her parents health insurance, does not live at home, etc.), then some statutory rules and statutory consequences become less relevant. However, such a board member would still be advised to abstain from participating in a variety of potential votes that would affect their child's employment.

This is because the common law (i.e., law that is defined through court cases as opposed to legislative statutes) establishes conflict-of-interest principles that will be applied to the parent-child relationship and to the divided loyalties that such a board member may have. A similar analysis would likely apply to other close relatives — such as a parent or an adult sibling. As a general rule, as the degree of kinship between the board member and his/her relative becomes more remote, there will be fewer restrictions on the board member's participation in board decisions and other official conduct. All the same, sometimes board members elect to avoid participating in certain decisions out of an abundance of caution or due to the appearance of a potential conflict of interest, even if the law would not strictly require the board member to abstain.

As a bottom line answer to the question, the legal analysis that applies to these kinds of conflict-of-interest scenarios is very context sensitive. A board member who has a relative (or other person with whom the board member has a special relationship, such as a non-married partner with whom the board

member resides) who is employed by the school district needs to carefully evaluate the extent to which they can lawfully participate in certain decisions affecting the employee's compensation, performance evaluation, and other terms and conditions of employment. Disclosing such relationships to the other members of the leadership team can put the team in a better position to help spot potential issues and engage in timely problem solving. More generally, all school board members need to evaluate the extent to which they may have divided loyalties or other biases on particular issues that counsel against the board member's participation in making some decisions.

6:10 Must school boards fill vacancies on the board when they occur?

Yes. A vacancy must be filled by appointment by the remaining members of the board. In addition, the school board of each common, union high and unified school district is required by section [120.12\(28\)](#) of the state statutes to adopt a policy addressing how a school board vacancy will be filled if the remaining school board members have not appointed a replacement within 60 days of the date on which the vacancy first exists. Such policies may rely on locally defined procedures such as drawing lots to break a deadlock or fully delegating the appointment decision to the school board president.

6:11 Are school district purchases subject to competitive bidding?

Generally, most purchasing and procurement procedures are at the local school district's discretion. Exceptions include mandatory bidding procedures that apply to energy savings contracts (under section [66.0133](#) of the state statutes) and health care insurance (under section [120.12\(24\)](#) of the state statutes), and extensive competitive procurement requirements that apply to certain purchases that are made using federal funds (including, as an example, goods and services that a district purchases in connection with federal school nutrition programs).

In situations where competitive procurement procedures (such as the use of competitive bids) are not dictated by a state or federal law, board policy may state that the district will competitively bid or otherwise seek competitive quotes or competitive proposals for contracts or purchases that are over a specific dollar amount. Such a policy may also state how the district's purchasing needs and any bid or proposal specifications will be publicized.

Court decisions have established a general principle that once a governing body, such as a school board, exercises its discretion and commits to a particular procurement process for a particular purchase, the school district is generally required to follow that process through. For example, if a school district has solicited sealed bids for a contract and expressly committed to awarding the contract based on the district's assessment of specific criteria, then the district is not permitted to drop those criteria and start a negotiation with just one of the bidders in the middle of the process.

For all purchases and contracts that are subject to school district discretion when it comes to determining the procurement procedures that the district will use, school districts generally find that it is advantageous to strike a balance between establishing some general parameters via policy while retaining substantial flexibility to customize procurement procedures on more of a case-by-case basis. Your district's superintendent and business manager can provide more information about your district's current approach to purchasing and procurement.

6:12 How is the budget formulated and approved?

The school board [considers and adopts an annual operating budget](#) for the district in accordance with state law. A school board should do all of the following in the development, approval and implementation of the annual operating budget:

- Set goals and parameters that advise budget preparation.
- Confirm the board's agreement with a tentative timeline for key process steps that are proposed to the board by the superintendent and, if applicable, the director of business services. The administration's proposal for the tentative timeline shall coordinate with the dates that important input data (such as the state budget and reasonable estimates of revenue and aid) are expected to be available.
- Approve the proposed budget that will be forwarded for public review in connection with a [budget hearing](#).
- Issue appropriate notice of, hold and attend the annual public budget hearing and [annual meeting](#) (if applicable – unified school districts do not have an annual meeting). The budget hearing shall provide district residents and taxpayers with an opportunity to be heard on the proposed budget.
- After the annual meeting (if applicable), budget hearing and no later than the date designated in state law for determining the district's tax levy, adopt the final annual operating budget in light of the board's goals, any feedback received from the public and applicable financial constraints.
- Determine the district's final tax levy in light of the final budget, with the board clerk timely certifying the tax levy to the appropriate municipalities.
- During the period between July 1 and the board's adoption of a final annual budget, the district may spend funds as needed to meet the immediate expenses of operating and maintaining the district's educational programs. As to such expenditures made prior to final adoption of the annual budget, the district's standard procedures for obtaining approval of purchasing decisions

and payments shall apply, with added consideration given to temporarily deferring expenditures, purchasing decisions, and payments when reasonably practical and when the district will not be disadvantaged by doing so.

Solely to the extent required by state law, changes to (1) the amount of tax to be levied or certified, (2) the amounts of the appropriations, or (3) the purposes for such appropriations, as stated within a board-approved budget may require a two-thirds vote of the entire membership of the board for approval. (See section [65.90\(5\)](#) of the state statutes.)

For detailed information, consult the [WASB/WASBO Budget Cycle Handbook](#).

7 Doing Your Homework

7:1 Is it important that I know every policy in the district's policy book?

One of your school board's most important functions is policymaking. Through policy, the board sets goals for the entire school system and provides directives for administrators and other staff to follow while working toward achieving these goals. Policymaking is a continuous process; it doesn't end once a policy decision is made. Your school board should review its policies on a regular basis. As a new board member, you will want to become familiar with your district's policies and, in particular, the policies that cover board operations and administration.

As a member of the WASB, your district can access [policy development materials](#) and other [Policy Services resources](#) on the WASB website. Sample policies from other Wisconsin school districts and other information on policy topics are available upon request as well.

Use the WASB [Policy Perspectives](#) newsletter and the electronic [Legal and Policy Services newsletter](#) as well as [the WASB publication The FOCUS](#), if your district is a subscriber, to stay on top of law changes affecting district policies and "hot policy topics." If your district subscribes to the WASB's web-based policy tool, the [Policy Resource Guide](#) (PRG), you have direct access to background information, sample model policies, and other related resources on specific policy topics as well as recorded WASB legal webinars.

7:2 How can I build my skills and knowledge to become a better board member?

First, become knowledgeable about your district, from its policies to its budget.

Second, engage in professional development. From school law and policy to community relations and strategic planning, there's a WASB program, presentation or resource available that can improve the knowledge and skills of school board members, administrators and other employees in your school district.

Some of the best board training often happens with individual boards on topics customized to meet their needs. With the WASB's cadre of experienced school attorneys and consultants, we're able to provide a wide spectrum of board governance training. If needed, we can blend legal and governance topics into a single, tailored workshop with an attorney and a governance consultant participating.

Avail yourself of the WASB resources. In addition to the policy resources listed above, the WASB sends out legal and legislative updates to all members through the Legal and Policy Services newsletter and the [Legislative Update](#) newsletter. The association also publishes an award-winning magazine, the [Wisconsin School News](#), which includes information about a wide range of topics. In addition, there are numerous other [legal publications](#) as well as a wide range of resources on the [WASB website](#).

Third, watch and listen to your colleagues.

7:3 Is board development mandatory?

No. However, research has demonstrated that “effective school boards take part in team development and training, sometimes with their superintendents, to build shared knowledge, values and commitments for their improvement efforts. High-achieving districts have formal, deliberate training for new board members. They also often gather to discuss specific topics. Low-achieving districts have board members who said they did not learn together except when the superintendent or other staff members made presentations of data. (Lighthouse I; LFA; LaRocque and Coleman)” (See [Center for Public Education – Eight Characteristics of Effective School Boards](#), 2011.)

In recognition of the importance of professional development, the WASB awards points to board members who participate in WASB and National School Boards Association activities through the [Member Recognition Program](#). Each August, the WASB sends out a Member Recognition Report, which reflects WASB programs attended for that year and the total accumulated points. Board members who attain certain levels in the Member Recognition Program receive pins and certificates at their Regional Meeting that fall.

7:4 Do I pay for these programs or does the district?

Most of the time the district pays for the board development. It is legal and appropriate for the district to pay for board members’ attendance at conventions, conferences, workshops, webinars and other developmental events that enhance the board’s knowledge and ability to do the district’s business. Payment must be authorized by a board resolution adopted prior to attendance or the board may delegate authorization to an executive officer. Because leaders are learners, it is prudent to include funds for board leadership training in the annual budget.

7:5 What services does the WASB offer?

The WASB team of experts range in skills from advocacy, leadership development and board governance, legal, policy and communications. Review the [At Your Service brochure](#) available on the WASB website for an overview of services and products. The WASB can customize a response to a district’s unique needs and requirements.

7:6 How do I manage the volume of reading that I have as a school board member?

Becoming a school board member is similar to going back to school in that there are continuing education courses available and there is “homework” you will have to prepare for board meetings. You’ll have a lot of reading to be fully prepared to discuss and vote on issues.

As every student learns, don’t wait until the last minute to do your homework. If you find you don’t have enough time to review materials prior to your board meetings, ask if it’s possible to get materials earlier. You’ll find as you become more experienced that the material becomes more manageable and easier to absorb.

7:7 Where can I get comparative information relative to other schools?

The Wisconsin Department of Public Instruction provides a wide array of [statewide student data](#) through its [WISEdash](#) platform. This encompasses everything from the school district’s report card to demographic data. The site includes guides, videos and other resources to learn how to use the platform.

The U.S. Department of Education also has a wide array of [data available](#) for review. In addition, the WASB provides [employee compensation and employee handbook information](#).

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8 Community Connections

8:1 With whom in the community should the board connect?

Community members are both the district’s “owners” and its clients. They pay for the district’s products and services and incorporate its graduates. Keep in mind that people support what they help create. If the district’s stakeholders don’t help to create the district’s vision, goals, standards, strategic plans, policies, budgets, etc., they may feel no ownership of them.

Although your board may not be able to engage every single group and community member, you should identify and engage key internal and external stakeholders. These individuals and groups can help or hinder the district in achieving its vision and goals. Key internal stakeholders may include students, faculty, staff, administrators, volunteers, PTA/PTO, etc. Key external stakeholders may include parents, taxpayers, unions, public officials, community leaders of business, civic, social and religious organizations, and representatives of higher education, health, social and youth services organizations.

8:2 How should the board engage the community?

Be proactive. Engage key stakeholders by inviting and appointing them to participate in standing and ad hoc committees, advisory panels, focus groups, forums and surveys to describe a vision for the district, set its goals, plan strategically, align resources with goals, and other actions offering them an opportunity to learn about public education and to influence governance decisions.

Use a variety of means to engage community members, inform them about the district, and learn about their interests, priorities and concerns. Print and electronic media, social media (be mindful of emerging trends for younger parents), the district’s website and face-to-face conversations all play important roles in a year-round district campaign to inform and to be informed.

While accentuating the positive — student successes and district progress — don’t neglect the negative. Be the first to let your community know about clouds looming on the horizon, and what you’re doing to dispel them. Board members and the superintendent can be effective ambassadors for the district, especially by scheduling dialogues with a cross section of your community — preferably in their neighborhoods as well as in online forums. And be prepared to address negative comments and feedback in a positive, proactive manner.

Part of your community engagement strategy should also encourage all members of the community to visit their schools. Invite them to extracurricular activities, schedule grandparents’ day, offer tours and briefings. In public education, familiarity often breeds support.

In addition, be mindful of your district’s brand and its customer service. The expectations of parents and community members are changing. The parents of your seniors may have far different expectations than the parents of your kindergartners.

All these actions and more should be in your district’s community engagement policy.

8:3 How do you bridge a gap between community and board?

Most gaps result from poor communication. Remember that communication is a team sport — both parties must have the opportunity to speak and both must actively listen. You should review your school board policy on community engagement. If none exists, develop one.

Check whether your policy provides a variety of methods for informing the community about the district. Does it use varied means of communication — print media (such as newsletters and board member or superintendent articles in local newspapers), a user-friendly website, multiple social media (Facebook and Instagram, for instance, to target different demographics) and oral delivery (such as board or superintendent talks with community organizations)? Does it provide various means for the public to inform the board and administration about its interests, priorities and concerns? Such means include opportunities for participation in district committees and advisory panels, focus groups, polling, social media and other online forums.

Does the policy seek to involve all elements of the community in district activities — e.g., encouraging volunteers, scheduling tours and briefings, inviting them to extracurricular events and special occasions? [WASB’s Policy Services](#) can help with policy updates.

Transparency is key. If your district operates separately from the community, gaps will remain. When you bring the community into their schools, and when you bring school information into the community, knowledge and trust will improve as the community senses that “your” schools are “their” schools — and that their schools are in your good hands.

8:4 How can I make sure I represent community sentiment?

No community is a single, uniform entity. Every community is comprised of various subgroups, such as parents and senior citizens and they want to engage in different ways. So, to represent your community, your first task is to identify the groups and subgroups that together compose your community, and learn about best practices for engaging them. It’s helpful to have a demographic and socioeconomic profile of community members served by your district. With it, you can check whether you really are aware of all community members, and whether your data and analysis truly reflect the total community.

Although individual board members may not be able to speak with everyone in your community about all issues, the board as a whole should be able to acquire valid input from a sound cross section of

community members. Varied approaches can be used. One is to include the public in committees, panels and forums as mentioned above. Some boards find it useful to rotate their meetings among various locations in the community. A telephone hotline number, dedicated email address or social media tool where citizens can leave comments and questions can also sometimes be helpful as long as the district consistently monitors the input that it receives and is reasonably comfortable navigating the records management or other possible challenges that might arise. Of course, all board members should make opportunities to converse with people throughout the community about district education. Listening is key.

8:5 How does one encourage school board service?

Promoting school board service as a meaningful way to contribute to your community is an ongoing responsibility of school board members. Your actions, teamwork and enthusiasm for board service will influence people in your community to consider serving on your school board.

Attracting qualified and energetic candidates results from activities taking place year-round, not just at election time. By increasing community participation within the schools, you can identify community members who might be willing to consider school board service. Invite individuals to join ad hoc committees, to volunteer in the classroom, or simply to attend various events at school to strengthen their involvement. In this way, potential candidates can become more aware of the challenges facing your schools and the successes you have enjoyed.

See the [Guide for Candidates](#) brochure on the WASB website. The WASB designed this pamphlet to provide a quick overview of school board service aimed at potential school board candidates.

8:6 How can boards increase public participation and support at meetings?

The first way to encourage public participation at meetings is to review how you treat the public when they come to your board meetings. A pleasant environment, a few social amenities and a procedure by which the public can address the board not only contributes to good decision-making, it fosters good public attitudes about those decisions. The cardinal rule in building support for public education is to invite input and treat the public with respect. District policies and procedures should make people feel that they are a welcome part of the board meeting and resulting decisions.

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9 Glossary of Education Terms

Academic intervention services – Services required of the school district to provide extra help to students who are not yet meeting the learning standards.

Accountability – Requiring school districts and states to ensure that schools meet their goals/standards.

ACT – A testing system designed by the ACT Corporation (ACT) to assess high school students' general educational development and their ability to complete college-level work.

Adequate yearly progress – The measurement established to determine the progress toward attaining proficiency in state assessments for all students and students in certain specified accountability groups in each public school, school district and charter school.

Alternative assessment – Any testing instrument other than standardized, multiple-choice questions, such as short-answer response and extended response, observation, individual or group performance assessment, and portfolios.

Appropriation – An authorization from the board of education or voters to make expenditures and to incur obligations for specific purposes.

Assessed valuation – The monetary worth of all property in the district as determined by the municipal assessor.

Assessment – Measuring or judging the learning and performance of students or teachers.

Average daily attendance – The aggregate days of attendance during a given reporting period divided by the number of days school is in session during that period. An important element in determining state aid.

Average daily membership – The sum of possible days attendance divided by the total days of instruction.

Average score – The mean (or average) scale score for each grade within a school or district for successive years for purposes of tracking relative academic growth from one year to the next.

Badger – The Badger Assessment is a statewide Wisconsin Student Assessment System (WSAS) standardized exam. The exam was given to students in grades 3 through 8 and measured student

achievement in two subject areas: English language arts (ELA) and mathematics. This exam was given in school year 2014-15 only.

Behavioral intervention plan – A behavioral intervention plan is most commonly a plan that is based on the results of a functional behavioral assessment under a student’s Individual Education Plan (IEP) (it can be also be a district initiated standalone plan outside of an existing IEP) and, at a minimum, includes a description of the problem behavior, global and specific hypotheses as to why the problem behavior occurs and intervention strategies that include positive behavioral supports and services to address the behavior.

Benchmark – A detailed description of a specific level of performance expected of students at particular ages, grades or developmental levels, typically used to monitor progress toward meeting performance goals within and across grade levels.

Block grants – Federal or state funding distributed in a lump sum directly to states or localities to administer and direct programs.

Categorical aid – State or federal aid which is intended to finance or reimburse a specific category of instructional or support programs or to aid a particular target group of pupils.

Charter school – An “independent and autonomous public school” established under state charter school law, eligible for funding from both private and public local, state and federal monies. In Wisconsin, charter schools can be authorized by a local school board or specific entities authorized under state law.

Cohort – A group of students who share the same statistical or demographic characteristic, such as grade level.

Common Core Learning Standards – A set of national standards that define the knowledge and skills students should have within their K-12 education careers in order to graduate from high school able to succeed in entry-level, credit-bearing academic college courses and in workforce training programs.

Core curriculum – The body of knowledge that all students are expected to learn.

Data-driven (or data-based) decision-making – Analyzing varied forms of data to identify educational strengths and/or weaknesses to plan for and implement improvements in student achievement as well as monitoring trends, and using this information to make decisions about the effectiveness of continuation or changes in district practices, curriculum, programs, procedures and policies.

Deficit – The amount by which total expenditures exceed total revenues for the fiscal year.

Demographic data – Information describing the students and citizens of a school district; usually includes characteristics such as race, age, gender, income, educational level and profession.

Distance learning – A mode of delivering education and instruction via the internet without a student physically attending the class.

Educator Effectiveness - The Wisconsin Educator Effectiveness System is a performance-based continuous improvement system designed to improve the education of all students in the state of Wisconsin by supporting guided, individualized, self-determined professional growth and development of educators.

Equalized value – The Equalized Value is the estimated value of all taxable real and personal property in each taxation district, by class of property, as of January 1, and certified by the Wisconsin Department of Revenue on August 15 of each year.

Executive session – A portion of the school board meeting that is not open to the public, most commonly referred to under the law as a closed session.

Forward – The Forward Assessment is a statewide Wisconsin Student Assessment System standardized exam. The exam was given to students in grades 3 through 8 and 10 and measured student achievement in two subject areas: English language arts, mathematics, science and social studies. This exam was given starting in school year 2015-16.

Fund balance – The reserves districts have to protect education programs and avoid property tax spikes when state aid is reduced or unexpected contingencies occur.

GASB – Governmental Accounting Standards Board, which sets the accounting rules for all governmental entities, including school districts.

Growth model – An accountability system that tracks student achievement over time.

Inclusion – Educating students with disabilities as appropriate in a regular classroom setting along with students without disabilities.

Individualized Education Program (IEP) – A written statement outlining the plan for providing an educational program for a student with disabilities based on the unique needs of that student.

Learning standards – The level of knowledge, skills and understanding that students should be able to demonstrate over time as a result of instruction or experience. There are generally two types of standards: content standards (what children should know, understand and be able to do as a result of their schooling) and performance standards (acceptable levels of student achievement).

Local revenue – Revenue category that includes resources from either property taxes or other local sources (fees, interest payments, insurance refunds, etc.).

Magnet school – A school that offers enriched curriculum in one or more subject areas; sometimes used as a means of desegregation.

Membership – Average number of resident, full-time equivalency (FTE) students on the third Friday of September and 2nd Friday of January (including part-time attendance by home-based or private school students) plus the summer school and foster group home FTE.

Open Meetings Law – A state law that governs the conduct of school board meetings.

Parliamentary procedure – A system of organizing a meeting to ensure an orderly, democratic process; Robert’s Rules of Order is most commonly used in Wisconsin.

Performance-based assessment – Tests which measure students’ abilities to perform tasks and solve problems rather than choosing answers from a number of possibilities.

Public Records Law – A state law that gives the public access to government records, as a way to foster increased understanding of and participation in government. The law provides a list of the kinds of records that are exempted.

Rubric – Used to evaluate student or teacher performance on specific tasks that cannot be scored by machine; specific descriptions, usually three or four, of what a particular task looks like at several different levels of performance.

SAT – A suite of tests intended to determine whether a student is “college ready.”

Section 504 – Section 504 of the Rehabilitation Act of 1973 requires a school district to provide a “free and appropriate education” to each qualified student with a disability who is in the school district’s jurisdiction, regardless of the nature or severity of the disability.

Title I – A federal aid program to provide schools with a high percentage of low-income families with additional funds to improve academic achievement.

Title IX – Title IX of the Education Amendments of 1972 protects people from discrimination based on sex in education programs or activities that receive federal financial assistance.

Value-added assessment – A type of growth model that focuses on the gains made year to year by individual students, their schools and districts.

Voucher – A way to allocate and distribute money to pay for a child’s education in a private school.

10 Common Acronyms

3K – Three-year-old kindergarten

4K – Four-year-old kindergarten

ADA – average daily attendance

ADD/ADHD – Attention Deficit Disorder/
Attention Deficit Hyperactivity Disorder

AED – automated external defibrillators

AP – Advanced Placement program

APR – Annual performance report

AYP – Adequate yearly progress

BIP – Behavioral intervention plan

CIMS – Comprehensive instructional management
system

CIPA – Children’s Internet Protection Act (federal)

CRT – Criterion referenced test

CTE – Career and technical education

DARE – Drug Abuse Resistance Education
program

EBD – Emotional behavioral disability

EC – Early childhood

ELA – English language arts

ELL – English learners

ERSS – Educationally related support services

ESEA – Elementary and Secondary Education Act
(federal)

ESL – English as a second language

ESSA – Every Student Succeeds Act (federal)

ESY – Extended school year

FAPE – Free appropriate public education

FAY – Full academic year

FBA – Functional behavioral assessment

FERPA – Family Educational Rights and
Privacy Act (federal)

FMLA – Family and Medical Leave Act (state and
federal)

FLSA – Fair Labor Standards Act (federal)

FTE – Full-time equivalency

GED – General education diploma

GPR – General program revenue

HSED – High school equivalency diploma

IB – International Baccalaureate program

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IDEA – Individuals with Disabilities Education Act (federal)

IEP – Individualized Education Program

ISES – Individual Student Enrollment System

K-16 – Kindergarten through college

KG – Five-year-old kindergarten

LEA – Local education agency

LEP – Limited English proficiency

LES – Limited English speaking student

LGBTQ – Lesbian, gay, bisexual, transgender, questioning

LPP – Local performance plan

LRE – Least restricted environment

NAEP – National Assessment of Educational Progress

NCLB – No Child Left Behind Act (federal)

OI – Orthopedic impairment

OML – Open Meetings Law (state)

OT – Occupational therapy

PAC – Political action committee

PBIS – Positive behavioral intervention and supports

PK or Pre-K – Pre-kindergarten

PT – Physical therapy

RTI – Response to Intervention

SEA – State education agency

SES – Supplemental educational services

SINI – School In Need of Improvement

SIP – State improvement plan

SLD – Specific learning disability

ST-3 – School district annual financial report

STEM – Science technology engineering math

SWD – Students with disabilities

SWoD – Students without disabilities

UPK – Universal pre-kindergarten

WAA-SwD – Wisconsin Alternate Assessment for Students with Disabilities (used in conjunction with the WKCE, last administered in the 2014-15 school year)

WKCE – Wisconsin Knowledge and Concepts Examination (previous statewide test, last administered in the 2014-15 school year)

WMAS – Wisconsin Model Academic Standards

WRS – Wisconsin Retirement System

WSAS – Wisconsin Student Assessment System

YRE – Year-round education

11 Acronyms of Well-Known Organizations

AASA – American Association of School Administrators (national)

AFT – American Federation of Teachers

ASCD – Association for Supervision and Curriculum Development (national)

ASBO – Association of School Business Officials (national)

AWSA – Association of Wisconsin School Administrators (principals)

CASS – Council of Administrators of Special Services (state)

CCDEB – County children with disabilities education board

CEC – Council for Exceptional Children (national)

CESA – Cooperative education service agency (there are 12 in Wisconsin)

DHFS – Department of Health and Family Services (state)

DPI – Department of Public Instruction (state)

ED (or DoED) – Department of Education (national)

ECS – Education Commission of the States

ERIC – Educational Resources Information Center (national)

ETS – Educational Testing Service (national)

FACETS – Family Assistance Center for Education, Training and Support (state)

GASB – Governmental Accounting Standards Board (national)

GAO – General Accounting Office (national)

NAESP – National Association of Elementary School Principals

NAPT – National Association for Pupil Transportation

NASBE – National Association of State Boards of Education (Wisconsin is one of two states that does not have a state board of education.)

NASSP – National Association of Secondary School Principals

NBPTS – National Board for Professional Teaching Standards

NCATE – National Council for Accreditation of Teacher Education

NCES – National Center for Education Statistics

NEA – National Education Association

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NSBA – National School Boards Association

NSC – National Student Clearinghouse

OCR – Office for Civil Rights, part of U.S.
Department of Education

OSEP – Office of Special Education Programs,
U.S. Department of Education

UFT – United Federation of Teachers

USDOE – U.S. Department of Education

WACLD – Wisconsin Association for Children
with Learning Disabilities

WASB – Wisconsin Association of School Boards

WASBO – Wisconsin Association of School
Business Officials

WASDA – Wisconsin Association of School
District Administrators

WCBVI – Wisconsin Center for the Blind and
Visually Impaired

WEAC – Wisconsin Education Association
Council

WERC – Wisconsin Employment Relations
Commission

WIAA - Wisconsin Interscholastic Athletic
Association

WFT – Wisconsin Federation of Teacher

WRCCS – Wisconsin Resource Center for
Charter Schools

WSD – Wisconsin School for the Deaf

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