

south carolina school boards association

2020

new board

orientation



Thursday
June 4



inside

New board orientation meeting materials

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Newly elected board members are **required by law** to successfully complete an orientation program. This training **must** be completed within one year from the date of election or appointment. The South Carolina Department of Education has approved this orientation as meeting the mandated requirement



Agenda

Thursday, June 4, 2020

- 8:30 a.m. Sign-in/check your screen/check your video and audio connection/and have your handouts available
- 9 - 9:15 a.m. **Welcome and about SCSBA**
- 9:15 - 10:15 a.m. **Understanding roles and responsibilities**
- Setting the vision
 - Establishing the structure and environment
 - Identifying accountability measures and monitoring progress
 - Being an advocate for schools and students
 - Fostering positive board/superintendent relationships
 - Adhering to a code of ethics
- Scott T. Price, *SCSBA Executive Director*
- 10:15 - 10:30 a.m. **Break**
- 10:30 - 11:45 a.m. **Avoiding the \$10,000 fine: What you need to know about South Carolina Ethics**
- In this session, you will get an overview of the Ethics Reform Act with an emphasis on the rules of conduct for new school board members.
- Meghan Walker, *Executive Director, S.C. State Ethics Commission*
- 11:45 a.m. - 12:30 p.m. **Lunch**
- 12:30 - 1:30 p.m. **The South Carolina Freedom of Information Act: Government in the sunshine or in a fishbowl?**
- This session will review the basic requirements of South Carolina's FOIA, focusing on school boards obligations regarding board meetings and the disclosure of public records.
- David T. Duff, Esquire, *Duff Freeman Lyon, L.L.C.*
- 1:30 - 1:45 p.m. **Break**

NEW BOARD ORIENTATION

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SCSBA ONLINE TRAINING

1:45 - 2:45 p.m.

School finance 101

A review of the revenue sources available to school districts with an emphasis on local and state funding. We will discuss property taxes, the Education Finance Act and other issues currently impacting the funding of education in South Carolina.

Lyde Graham, *Director of Operations, Clarendon School District 2*

3 p.m.

Workshop closing



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NEW BOARD ORIENTATION

SC School Boards Association Services

- **Statewide Conferences – *Boardmanship Institute***
- **On-site Board Training**
- **Superintendent Search**
- **Policy and Legal Services**
- **Referendum Consulting**
- **Legislative and Advocacy Services**
- **Communications Services – *Legislative Updates, e-Clips, e-Focus***
- **SCSBIT - Insurance Trust**
 - P&C, WC, risk management

2



SCSBA is Your Association!

How can you be involved?

- Boardmanship Institute
- 2DAC
- Regional meetings
- Resolutions process
- Delegate Assembly
- Board of Directors
- Annual Conference presentations
- Webinars
- Advocacy

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Understanding Roles and Responsibilities

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**NEW BOARD
ORIENTATION**

Board Roles and Responsibilities Section B

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**NEW BOARD
ORIENTATION**

Board Powers and Duties *BBA*

- Policymaking - adoption of policy
- Executive - hold the superintendent accountable
- Quasi-judicial - a court of appeals
- Appraisal - evaluate policy effectiveness
- Planning - continuous improvement
- Interpretation - being the link to citizens
- Operational - effective board meetings
- Budget - providing necessary resources
- Reviewing action - the final authority
- *Visits to schools - use proper protocol

6



***Sidebar – Visits to Schools (BBA)**

Board members should make official visits to the school only under board authorization and with the full knowledge of staff including the superintendent, principals, and other supervisors.

Board members may make informal visits to schools or classrooms after making arrangements for visitations through the principals of the various schools. Such visits will be regarded as informal expressions of interest in school affairs and not as "inspections" or visits for supervisory or administrative purposes.

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Board’s job v. Superintendent’s job
BDD

School Board

- Selects superintendent
- Sets policy
- Adopts budget
- Approves organization
- Approves personnel matters
- Functions as a board only
- Staff matters through superintendent
- Acts as a court of appeals
- Adopts curriculum

Superintendent

- Selects staff
- Recommends and implements
- Proposes and administers
- Proposes organization
- Recommends personnel matters
- Deals with the board as a whole
- Staff matters through superintendent
- Actions based on policy
- Recommends curriculum

8

20/20



**NEW BOARD
ORIENTATION**

In short...

Boards govern

Superintendents manage

9

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**NEW BOARD
ORIENTATION**

Good governance? Overstepping? Bad idea?

A board member posts a question on Facebook asking for input on a high school English teacher's behavior/action.



She states in the post that her daughter is upset because of the way the teacher runs her classroom and wants to know if others are having the same concerns.

She goes to the superintendent with the Facebook comments/concerns and says she wants something to change.

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**NEW BOARD
ORIENTATION**

Board-Superintendent Relationship

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**NEW BOARD
ORIENTATION**

Your School District's Education Leadership Team

The board and the superintendent

To be effective, we start with agreeing on the work of the board versus the work of the superintendent.

12



20/20

NEW BOARD ORIENTATION

Governing and managing

- Policy adoption is the function of the board
- Policy implementation is the function of the superintendent

Stay on your page!!

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20/20

NEW BOARD ORIENTATION

BOARD – SUPERINTENDENT RELATIONSHIP

The superintendent is the CEO for the district

In a sense, the superintendent is a “member” of the board ... with limits

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BOARD – SUPERINTENDENT RELATIONSHIP

- There is nothing more important than both parties dealing with each other in an ethical, honest, straight-forward, open-and-above-board manner
- A knowledge of what each can reasonably expect of the other can help substantially in promoting sound working relationships

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Good governance? Overstepping? Bad idea?



A classified job has been posted properly, per district policy.

A board member calls the superintendent to advocate for the hiring of a specific individual stating that they are a good person and in need of a job.

They feel that since they are on the board they should have a say in the hiring of staff.

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**NEW BOARD
ORIENTATION**

What about individual board members?

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**NEW BOARD
ORIENTATION**

BOARD MEMBER AUTHORITY

- The power of individual board members exists exclusively in their action as a group.
- Individual board members, including the chair, have only such authority as delegated by board vote or policy provision.
- The board and its members deal with administrative services through the superintendent and should not give orders to any subordinates (of the superintendent) either publicly or privately.

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NEW BOARD ORIENTATION

BOARD MEMBER AUTHORITY (*Code of Ethics*)

- The board will not be bound in any way by actions or statements of an individual.
- Individual board members making information requests to the superintendent.
- The board officers may, when appropriate, counsel individual members who are acting outside his/her authority and responsibilities or abusing his/her privileges.

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NEW BOARD ORIENTATION

The board is a “committee of the whole”

You have no more authority than any other member of the public.

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**NEW BOARD
ORIENTATION**

It is not your job to “fix” things.

*You have to follow the proper
chain of command!*

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**NEW BOARD
ORIENTATION**

The problem is...

Your constituents don't know that!

22

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NEW BOARD ORIENTATION

Memorize this statement!

This problem could end up requiring board action, and if I am involved in it at this level, I will be unable to act on it as a member of the board because it could be a violation of due process.

You really need to go through the proper channels.

23

20/20



NEW BOARD ORIENTATION

Good governance? Overstepping? Bad idea?

A board member writes a weekly blog about life in rural South Carolina.



In his most recent blog, he criticized the district's actions.

He states that the board voted in favor of the actions but that he disagrees and thinks the vote should have gone the other way.

In the blog, he is asking to hear from others who support his take on the issue so he can continue to let the superintendent know his feelings.

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**NEW BOARD
ORIENTATION**

Advocates for Public Education

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**NEW BOARD
ORIENTATION**

Credible sources of information

- 49% give local public schools an A or B grade, matching its average since 1999 (2017 PDK)
- 62% among public school parents (PDK)
- Public schools nationally are graded more severely – 24% of respondents give an A or B grade (PDK)
- Public trust in government at record low – divided sharply along partisan lines, but higher for public education – up to 36% from 29% (2017 Pew Trust)
- Trust in media at an all-time low (Pew) – direct communications from school higher than news media – 3.8 – parent; 3.5 – nonparent on a scale of 1 – 4 (NSPRA)

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NEW BOARD ORIENTATION

Advocacy “Big Picture”

- Most board members want the same thing: improve educational outcomes for all students in their district.
- We don’t always agree on the same things; HOWEVER, when it comes to advocacy we MUST be on the same page.
- Accurate, timely, and understandable communication is a necessity.

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20/20

NEW BOARD ORIENTATION

Meeting management

The Bottom Line

The sole purpose of a meeting is to determine the collective will of the majority in a fair and efficient manner.

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NEW BOARD ORIENTATION

Meeting management - FOIA, policies, Robert's Rules

- BEC – Executive Sessions/Open Meetings
- BEDA – Board Meeting Notification
- BEDB – Agenda
- BEDC – Quorum
- BEDD – Rules of Order
- BEDG – Minutes of Board Meetings

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NEW BOARD ORIENTATION

Meeting Goals

- Meeting is structured
- Everyone has an opportunity to speak
- Business is discussed, not people
- Reduce or eliminate conflict
- Votes are conducted properly
- Board members are engaged

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NEW BOARD ORIENTATION

Open Meetings

- **Notice**
Requirements for regular, called, special, or rescheduled meetings
- **Agenda**
Posting and making changes
- **Closed Meetings (Executive Session)**
Statutory process for entering executive session
* Board members/invited persons duty bound not to disclose discussions!

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NEW BOARD ORIENTATION

Good governance? Overstepping? Bad idea?

The board held an executive session last week dealing with a student.



This week at the post office a community member approached you and asked you a specific question about something that was discussed in the executive session.

You call the board chair and the superintendent to tell them that there has been a breach of confidentiality and you want them to know.

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Questions?

Thank you!

AVOIDING THE \$10,000.00 FINE

MEGHAN WALKER

EXECUTIVE DIRECTOR

SC STATE ETHICS COMMISSION

SC SCHOOL BOARD ASSOCIATION

1

SOUTH CAROLINA ETHICS COMMISSION

PRIOR TO APRIL, 2017

Nine commissioners appointed by the governor.

The commission had no authority over members of the General Assembly.

CURRENT COMPOSITION

8 commissioners appointed; 4 by the Governor, 1 by House Democrats, 1 by Senate Democrats, 1 by House Republicans and 1 by Senate Republicans.

The commission has the authority to investigate complaints against members of the General Assembly.

2

Who Does the Act Cover?

- Public Officials
 - Any elected or appointed official of the state (excluding judges) and any candidate for such office.
- Public Members
 - An individual appointed to a noncompensated, part-time position on a board, commission or council.
- Public Employees
 - Any person employed by the state.

3

STATEMENTS OF ECONOMIC INTERESTS

Every school board member *must* file an SEI every year.

4

WHEN TO FILE YOUR SEI

- WHEN FIRST ELECTED: FILE BEFORE ASSUMING YOUR RESPONSIBILITIES.
- EVERY YEAR THAT YOU'RE ON THE BOARD: FILE BY MARCH 30TH.

5

Information Required On Your SEI

- The source, type, and amount or value of income, not to include tax refunds, of substantial monetary value received from a governmental entity by the filer or the filer's immediate family.
- Description, value and location of real property owned/options to purchase real property by filer or immediate family if:
 - Public improvements were made in excess of \$200.00
 - OR
 - The interest can reasonably be expected to be the subject of a conflict of interest.
 - If a sale, lease, or rental of personal property is to a state, county or municipal instrumentality of government, a copy of the contract, lease or rental agreement must be attached to the SEI.

6

Information Required On Your SEI

The name of each organization which paid for or reimbursed actual expenses of the filer for speaking before a public or private group, the amount of such payment or reimbursement, and the purpose, date and location of the speaking engagement.

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The screenshot displays the SC State Ethics Commission's website. The main content area shows the "Statement of Economic Interests Report" for Nikki R. Haley, filed in 2012. The report includes a table of income and benefits, with the following data:

Source	Type	Amount / Value	Miscellaneous
State of South Carolina	Income State or Local Government	\$94,147.51	Personal Income
State of South Carolina	use of state car State or Local Government	\$1.00	Personal Income
State of South Carolina	use of state plane State or Local Government	\$1.00	Personal Income
State of South Carolina	use of state residence State or Local Government	\$1.00	Personal Income
Penguin Group USA	book advance State or Local Government	\$200,000.00	Personal Income

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QUARTERLY CAMPAIGN DISCLOSURES

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REQUIRED INFORMATION ON CAMPAIGN DISCLOSURES

- Total amount of contributions accepted.
 - Date and amount of each contribution.
 - Name, address and occupation of each person making a contribution.
- Total amount of expenditures made.
 - Name and address of each person/entity to whom an expenditure is made.
 - The date, amount and purpose of each beneficiary of an expenditure.

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Campaign Expenditures and Cash

8-13-1348

A campaign expenditure more than \$25 must be made by (1) written instrument, (b) debit card, or (c) an online transfer.

A campaign expenditure of less than \$25 must be account for “by a written receipt or written record.”

A candidate may not withdraw more than \$100 from a campaign account to establish or replenish a petty cash fund. At no time may a petty cash fund exceed \$100.

Expenditures from a petty cash fund may only be used for office supplies, food, transportation expenses, and “other necessities” and may not exceed \$25 for each expenditure.

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WHEN TO FILE A CAMPAIGN DISCLOSURE

- When you raise and/or expend five hundred dollars or more, you must file an initial certified campaign report.
- After filing an initial report, campaign reports must be filed within ten days following the end of each calendar quarter.
- Campaign reports must be filed for each quarter in which contributions are received or expenditures are made until a campaign account undergoes final disbursement.
- At least fifteen days, but not more that twenty days, before an election a candidate must file a campaign report showing contributions of more than one hundred dollars and expenditures for the period ending twenty days before the election.

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The screenshot shows the South Carolina State Ethics Commission's Public Disclosure and Accountability Reporting System. The page is titled "Individual Reports Candidate Campaign Disclosure" and displays a report for "2017, January 10th Report" for candidate Haley, Nikki. The report details her position sought (Governor), election type (General), election date (06/10/2014), filing type (Original), and filing date (01/17/2017). A message states: "*** No Contributions Reported. ***". Navigation options include "Back" and "Open Full Report >".

Quarterly Campaign Disclosure

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CLOSING YOUR CAMPAIGN ACCOUNT

- You must file quarterly campaign disclosures until you close down your campaign account.
- You can close down your campaign account when you have a zero balance in your account. You can achieve a zero balance in the following ways:
 - Contribute to the Children’s Trust Fund or another 501(c)(3).
 - Returned pro rata to all contributors
 - Contributed to the state’s general fund

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NONCOMPLIANCE

- Remember that this covers information from the previous year.
- Due upon assumption of official duties and then by March 30th of each calendar year.

PENALTIES

- Initial \$100.00 penalty.
- After certified letter is delivered: \$10.00 dollars a day after ten days.
- After ten days: \$100.00 day until maximum penalty of \$5,000.00 is reached.
- There may also be a complaint filed which means possible additional fines and fees.

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NONDISCLOSURE

- Must disclose all information required in your SEI.
- If you fail to disclose the required information, you may be given a chance to correct the omission.

PENALTIES

- Maximum fine of \$2,000.00
- Complaint can be filed which may mean additional fees.

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INFLUENCING THE OUTCOME OF AN ELECTION

No person may use government funds, property or time to influence the outcome of an election.

This includes using government time and resources to influence the outcome of an election or ballot measure. For purposes of this statute, ballot measure means:

Referendum, proposition, or measure submitted to voters for their approval.

This is not a prohibition against a governmental entity preparing informational materials, conducting public meetings or responding to news media or citizens' inquiries concerning a ballot measure affecting the governmental entity.

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CONFLICTS OF INTEREST

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SELF DEALING AND NEPOTISM

- Section 8-13-700(A)
 - "No public official, public member, or public employee may knowingly use his official office, membership, or employment to obtain an economic interest for himself, a family member, an individual with whom he is associated, or a business with which he is associated."
 - Exception for incidental use not resulting in additional public expense.
- Section 8-13-700(B)
 - "No public official, public member, or public employee may make, participate in making, or in any way attempt to use his office, membership, or employment to influence a governmental decision in which he, a family member, an individual with whom he is associated, or a business with which he is associated has an economic interest."

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FAMILY MEMBERS

Your spouse, parent, brother, sister, child, mother-in-law, son-in-law, brother-in-law, sister-in-law, grandparent or grandchild.

Dictionary defines brother-in-law as:

- a - the husband of one's sibling
- b - the husband of one's spouse's sibling

ECONOMIC INTEREST

An interest distinct from that of the general public in a purchase, sale, lease, contract, option, or other transaction or arrangement involving property or services in which a public official, public member, or public employee may gain an economic benefit of fifty dollars or more.

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PERSON WITH WHOM YOU ARE ASSOCIATED

An individual with whom the person or a member of his immediate family mutually has an interest in any business of which the person or a member of his immediate family is a director, officer, owner, employee, compensated agent, or holder of stock worth one hundred thousand dollars or more at fair market value and which constitutes five percent or more of the total outstanding stock of any class.

BUSINESS WITH WHICH YOU ARE ASSOCIATED

A business of which the person, or a member of his immediate family, is a director, an officer, owner, employee, a compensated agent, or holder of stock worth one hundred thousand dollars or more at fair market value and which constitutes five percent or more of the total outstanding stock of any class.

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Violations of 740

- Representing a person before any agency, unit or subunit of your board for which the public official has official responsibility except as required by law.
 - Applies unless representation occurs in the normal course of business, is ministerial or is personal in nature.

PENALTIES

- Maximum fine of \$2,000.00

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WHEN IN DOUBT...

If you are unsure of your duties under
the South Carolina Ethics Act...

DO NOT ACT

Take the following steps:

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EVALUATE WHAT, IF ANY, CONFLICT YOU HAVE

- 1) Is there an economic interest for you?
- 2) Is there an economic interest for a family member of yours?
- 3) Is there an economic interest for a person with whom you are associated?
- 4) Is there an economic interest for a business with which you are associated?

IF YOU ARE NOT SURE OF THE ANSWER TO ANY OF THESE QUESTIONS,
CONTACT US AND REQUEST A FORMAL OR INFORMAL OPINION

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IF YOU HAVE A
CONFLICT THEN
YOU **MUST**
RECUSE
YOURSELF!

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HOW TO RECUSE YOURSELF

- 1) Prepare a written statement describing the matter requiring action or decision and the nature of your potential conflict of interest with respect to the action or decision.
- 2) Public Officials: Furnish a copy to the presiding officer of your board, who shall cause the statement to be printed in the minutes and shall require that you be excused from any votes, deliberation and other actions on the matter in question.

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REQUESTING AN OPINION

As a public official, you can request either an informal or formal opinion from the State Ethics Commission.

A formal opinion is issued by the Commission and is binding.

An informal opinion issued by Commission staff is not binding,

For sensitive matters, you may request a confidential formal or informal opinion. Requests must be made in writing.

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Opinions You Need to Know

SEC AO 92-071: The State Ethics Commission would advise that public employees or officials weigh the impact on a case by case basis of offers by vendors who have contracts with a school district to provide meals, golf outings, etc. Vendors may sponsor conference activities in accordance with sponsor solicitation guidelines established in Advisory Opinion SEC AO92-061.

SEC AO 92-134: A family member of a school board member may continue as an employee of the school district without violating the Ethics Reform Act. A family member of a school board member may be hired by the school district provided the member does not cause the employment or participate in the employment of the family member. School board members who have family members employed within the school district may vote on general salary increases for school employees but may not participate in salary raises for the family member which are not general salary increases.

SEC AO 93-072: The spouse of a school board chairman may be hired as a principal within the chairman's district, provided the chairman takes no action regarding the hiring and has no supervisory or management authority over his spouse.

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2020 SCSBA
New Board Members' Orientation
06/04/20

The South Carolina Freedom of Information Act: Government in the Sunshine (or in a Fishbowl)

David T. Duff
803-790-0603; dduff@dfl-lawfirm.com



1

FOIA – FINDINGS & PURPOSE

“The General Assembly finds that it is vital in a democratic society that public business be performed in an open and public manner so that citizens shall be advised of the performance of public officials and of the decisions that are reached in public activity and in the formulation of public policy.”



2

FOIA – HISTORY

- * South Carolina first adopted a freedom of information act in 1974 to provide access to the meetings and records of public bodies like school districts.
- * The law has been amended several times, most recently in 2017.
- * Courts and the SC Attorney General's office continue to interpret FOIA's provisions, almost always in ways in favor of greater openness.



3

FOIA PROVIDES FOR:

- *Inspecting/Copying public records of the public body
- *Noticing/conducting meetings of the body



4

FOIA - RESPONSIBILITIES

- *Administration primarily deals with access to records
- *Board primarily handles meeting requirements, with assistance from the administration



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WHO IS SUBJECT TO FOIA?

- *"Public bodies": includes all political subdivisions, including school boards and districts
- *Board committees, subcommittees, advisory committees



6

FOIA - MEETING REQUIREMENTS

- *A convening of a quorum of the public body in person/electronically to conduct the Board's business
- * "Work session" meetings
- *Emails among a quorum??



7

FOIA - MEETING NOTICE/AGENDA

- *Regular meetings: written notice at beginning of year, notice with agenda at least 24 hours in advance, notice to local media
- *Special Called meetings: notice/agenda at least 24 hours in advance
- *Emergency meetings: reasonable notice



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FOIA - AGENDA AMENDMENTS

- *At least 24 hours in advance
- *Amendments at the meeting:
 - Discussion-only item: follow district policy
 - Action item: 2/3 vote
 - Final action item: 2/3 vote & finding of emergency/exigent circumstance



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FOIA - MINUTES

- *Date, time, place; members present/absent; substance of matters proposed/discussed/decided
- *Copies for past 6 months available for inspection



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FOIA - EXECUTIVE SESSION

- *Vote in open session, motion must be specific
- *No action can be taken



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FOIA - EXECUTIVE SESSION GROUNDS

- *Hiring/firing/discipline of employees
- *Student discipline hearings
- *Receipt of legal advice



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FOIA - EXECUTIVE SESSION GROUNDS

- *Discussion of contractual negotiations & proposed sale/purchase of property
- *Discussion of development of security devices/personnel
- *Investigation of criminal conduct



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FOIA - ACCESS TO PUBLIC RECORDS/INFORMATION

- *"Public records" includes all records, regardless of form, prepared, owned, used or in possession of the public body
- *Emails between and among staff, committee members, and among board members



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FOIA - 2017 AMENDMENTS

*Reduces time for initial response to requests to 10 days, but allows 30 days thereafter to produce records

*If districts wish to charge for copies, fee schedule must be posted



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FOIA - COMMON ITEMS/ISSUES re: DISCLOSURE

*Information of a personal nature (personnel files, superintendent evaluations)

*Compensation of Employees

* Applicant information/materials



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FOIA - COMMON ITEMS/ISSUES re: DISCLOSURE

- *Materials re: proposed contractual relations
- *Correspondence or work product of legal counsel
- * Matters exempt under other laws, e.g., FERPA



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HYPOTHETICAL SITUATION (1 of 6)

School Board X holds executive sessions at 6 PM before its open session at 7 PM, after first having dinner at 5:30 PM in a conference room adjoining the Auditorium where it meets in public. This evening the Board needs an executive session to hear a student discipline appeal and to consider purchase of a site for a new school.



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HYPOTHETICAL SITUATION (2 of 6)

The notice/agenda states the Board meets at 7 PM in the Auditorium, after executive session. At 6 PM, in the conference room, with the door between the conference room and the Auditorium open, the Board Chair convenes the meeting and asks for a motion to go into ES for a “student appeal” and a “property matter.”



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HYPOTHETICAL SITUATION (3 of 6)

The motion passes and the Board shuts the door between the two areas, conducts the student appeal and discusses the land purchase. When the Board deliberates on the student appeal, one Member the district’s “zero tolerance” policy for weapons.



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HYPOTHETICAL SITUATION (4 of 6)

After discussing the land purchase, the Board takes a “straw poll” to see if a majority are in favor of buying the land.



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HYPOTHETICAL SITUATION (5 of 6)

Once back in open session, the Board votes to uphold the discipline of “Student A” and to buy “a proposed school site” for a price not to exceed the “figure discussed in executive session.”



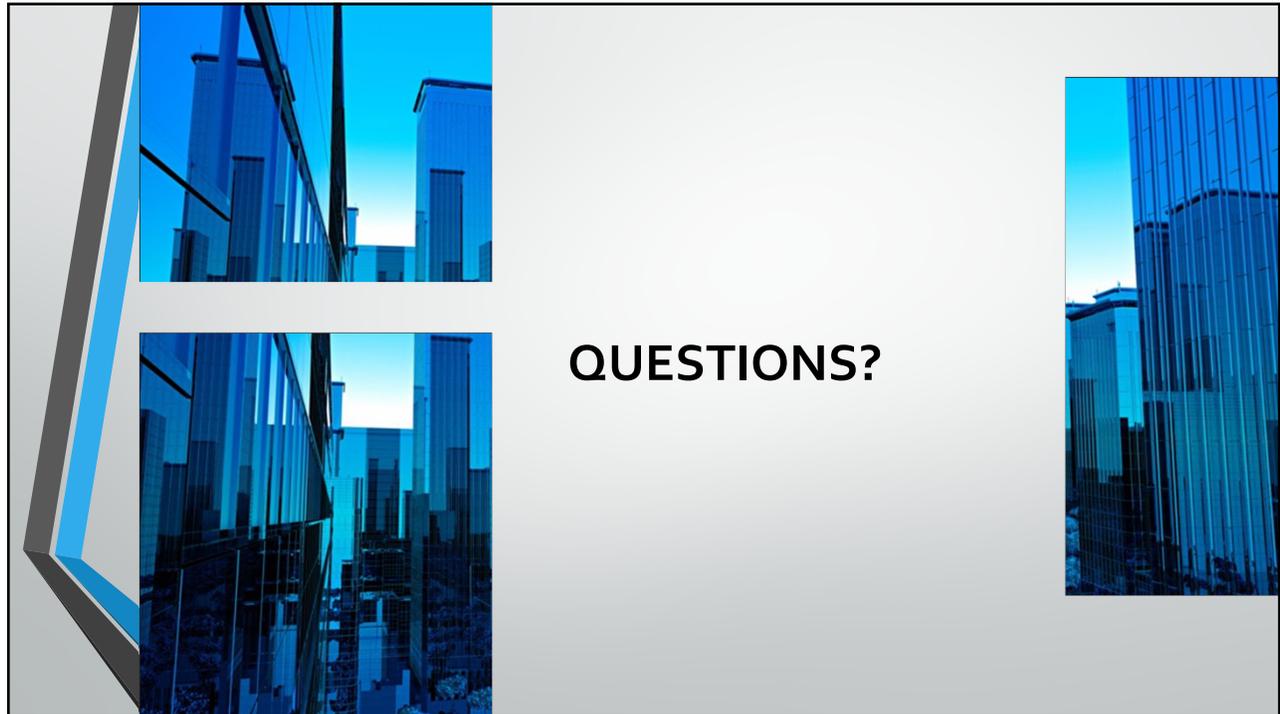
22

HYPOTHETICAL SITUATION (6 of 6)

The agenda for public session states only that the Board may vote on “items discussed in executive session,” without further specificity. After the meeting adjourns, a news reporter wants to know the designation of the offense committed and the name of the school and the grade level of “Student A” and the location and offering price for the proposed school site.



23



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Contact us



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DFL-LAWFIRM.COM



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Phone
803-790-0603

Financing Education in South Carolina

SCSBA New Board Members
June 4, 2020



1

1

High Level Overview



- **General Fund** – The principal operating fund of the District
- **Special Revenue & EIA Funds** – account for State and Federal funds which are allocated for specific programs or initiatives.
- **Debt Service** – accounts for the payment of interest and principal on long-term general obligation debt.
- **School Building Fund** – accounts for the construction, repair, renovation, and acquisition of school facilities. Can include capital equipment.
- **Food Service Fund** – accounts for the USDA's approved school breakfast and lunch programs.

2

2



What is a Budget

- “Simple Definition”: a school budget describes a district’s **plan** for the upcoming year as related to anticipated revenues and expenditures.
- Should convey your values and priorities
- A tool for monitoring actual results
- Provides a foundation for the next year

3

3



Where does the \$ come from?

The Basic Building Blocks

- Local Revenue
- State Revenue
- Federal Revenue
- Other Financing Sources

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Local Revenue

- Outside the issuance of General Obligation Bonds, this is the **major** source of revenue that the District has the ability to raise.
- Major Source: Property Taxes

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State Revenue

- Education Finance Act (EFA) *
- Fringe Benefit Employer Contributions *
- Teacher Salary *
- * State Aid to Classrooms (FY 20)

6

6



State Revenue - Cont'd

- Education Improvement Act (EIA)
- Education Accountability Act (EAA)
- Education Lottery Act
- ACT 388 (Reimbursement for Local Property Tax Relief)

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7



Education Finance Act (EFA)

- Passed in 1977
- Cornerstone of State Funding
- A National Model for Funding Education
- Has served us well for four decades

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8



EFA

In 2014 the Governor's Education plan added additional weighting factors for:

- High Achieving Students
- Limited English Proficiency
- Academic Assistance
- Pupils in Poverty
- Dual Enrollment

These weighting are directed for individualized instruction based on the needs of the student.

All students are weighted at 1.0 except special needs students.

9

9



Education Improvement Act (EIA)

- The Education Improvement Act of 1984 was South Carolina's original blueprint for enacting a quality program of public instruction for current and future generations. A one cent state sales tax increase provides additional funds.

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10



EIA

- Raise student performance by increasing academic standards;
- Strengthen the teaching and testing of basic skills;
- Elevate the teaching profession;
- Improve leadership, management and fiscal efficiency;
- Implement quality controls and reward productivity;
- Create more effective partnerships among schools, parents, community and business; and
- Provide school buildings conducive to improved student learning.

11

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Education Lottery Act

- Higher Education receives the largest share
- In 2015 -16, these funds were included in the EFA Funding

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ACT 388

- Applicable to General Fund
- Residential owner/occupied exemption from taxes on school operations
- Funded from:
 - Tier I: The 1995 \$100,000 Exemption
 - Tier II: The \$50,000 Homestead Exemption
 - Tier III: The additional penny sales tax
- For 2007-08, Districts to receive \$ for \$ reimbursement from the State
- For any subsequent year, Districts will receive the “base” established in 2007-08 plus a portion of the total additional funding available that will grow by the statewide inflation rate and population growth

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ACT 388 - PROPERTY TAX REFORM

MILLAGE CAP

- Millage caps are in place for all local governing bodies.
- Millage may be increased only by CPI plus the population growth of the entity from the prior year.
- The cap may only be exceeded with 2/3 vote of the local governing body and only for the following reasons:
 - ~ Deficiency from previous year
 - ~ National disaster/act of terrorism
 - ~ Court order
 - ~ Close of a business that decreases tax revenues by more than 10%
 - ~ Un-funded state or federal mandate.

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ACT 388 PROPERTY TAX REFORM

CONCERNS

- Growing school districts
 - ~ Revenues per student
 - ~ New school start-up costs
- Index of Taxpaying Ability
- Funding inequities among similar size districts
- The real concerns are the limitation imposed on local funding and the volatility of sales tax revenues.

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Federal Revenue

Major Sources

- School Food Service Programs
- Title I
- Individuals with Disabilities Education Act (IDEA)

16

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Proceeds from General Obligation Bonds

- Applicable to School Building Fund
- Used to construct, renovate, repair, and equip school facilities
- Types
 - Referendum
 - 8% Debt

17

17



General Fund

- **Revenue**
 - Local
 - Property Taxes
 - State
 - EFA
 - Fringe
 - ACT 388
 - Bus Driver
 - Other
 - Interest
 - Rentals
 - Tuition

18

18



General Fund

- **Expenditures**
 - Salaries and Benefits 85 – 90 %
 - Fixed Cost 3 – 5 %
 - Utilities
 - Contracts
 - Other 5 – 12 %
 - Instructional Supplies
 - Staff Development
 - Other Supplies

19

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Salary FOIA

- A common FOIA request from the newspapers is for a list of employees who make over \$50,000. This request applies to all employees including teachers, coaches and administrators

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District Comparisons

As a Board member you will hear that your District spends **X** per pupil and that District A spends **Y** per pupil. When making comparisons...

There are many factors to consider:

- Size of schools
- Pupil teacher ratio
- Poverty
- Handicapped student population
- Salary schedules
- Programmatic Initiatives
- Geographic size

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21



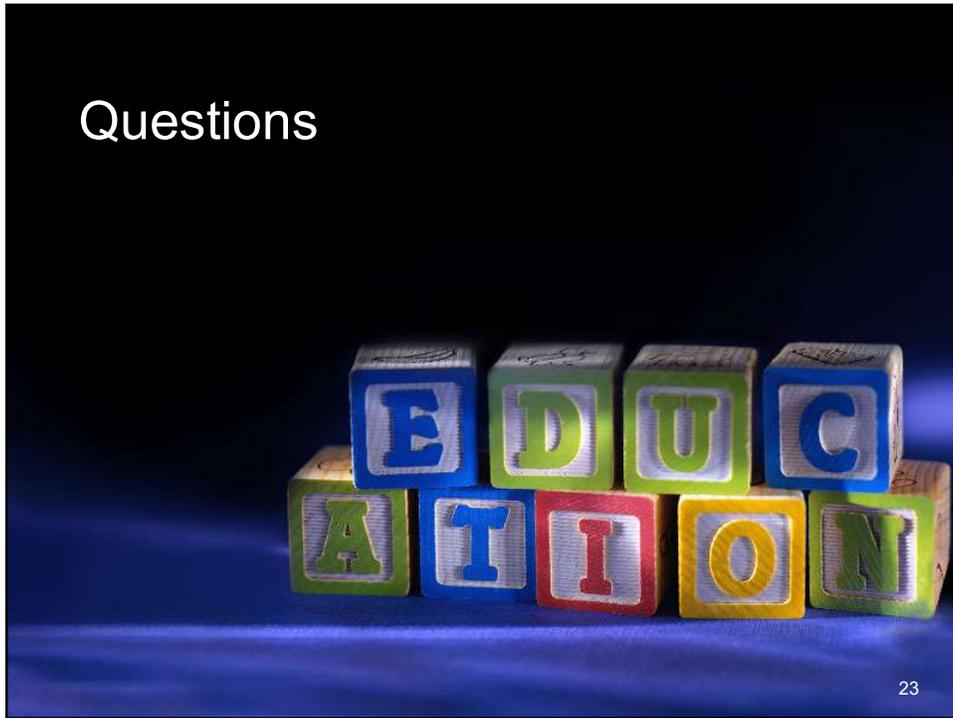
District Comparisons

Again.... Your District's budget and per pupil expenditure reflect the choices of your community.

22

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Questions



23



Speaker Biographies

WELCOME



**Chuck Saylor, SCSBA President,
Greenville County Schools**

Chuck Saylor, member of the Greenville County Schools Board, was installed as president of the South Carolina School Boards Association during the association's annual Delegate Assembly held Saturday, December 7, in Charleston. Saylor was elected to the Greenville County Schools Board in 2002.

He has served as chair and on numerous committees while on the Greenville Board. He has served on the SCSBA board since 2015. Saylor is a lifelong resident of the Greenville community. His educational background includes Greenville County Schools, Greenville Technical College and the University of South Carolina. Saylor is the vice president of the Construction Management Division of MB Kahn Construction Company based out of Columbia, S.C. Saylor is a past State President for the South Carolina PTA and served as the first male National PTA President during the 2009–2011 term. He served as president of the National Federation of Urban Suburban School Districts (NFUSSD) in 2014 and served as a member of the Board of Directors of the South Carolina Association of School Administrators (SCASA) from 2013–2016. He previously served as a member of the Advisory Committee for the Green Ribbon Schools project of the United States Green Building Council (USGBC).

ABOUT SCSBA AND UNDERSTANDING ROLES AND RESPONSIBILITIES



**Scott T. Price, SCSBA Executive
Director**

Prior to joining the association in October 1996, Price was an associate with the Columbia law firm of Tompkins and McMaster.

Price received a law degree from the University of South Carolina School of Law in 1994, and a Bachelor of Arts degree from USC's College of

Journalism in 1986. He is a former newspaper reporter who worked at daily and weekly newspapers in South Carolina and North Carolina.

AVOIDING THE \$10,000 FINE: WHAT YOU NEED TO KNOW ABOUT SOUTH CAROLINA ETHICS

**Meghan Walker, Executive Director, S.C. State Ethics
Commission**

Walker is a native of Irmo, South Carolina. She graduated from Irmo High School in 2002 and then continued her education at the University of South Carolina where she double majored in Marketing and Management with a minor in Political Science. While at the University of South Carolina, Walker developed an interest in law and decided to continue her education at the University of South Carolina School of Law, graduating in 2009. Immediately after graduation, Walker accepted a judicial clerkship with the Honorable L. Casey Manning. While clerking for Judge Manning, she was able to observe both criminal and civil terms of court and was therefore able to discover her passion for criminal law.

At the conclusion of her clerkship, Walker accepted a job with the South Carolina Attorney General's Office where she had previously worked as a law clerk. During her tenure at the Attorney General's Office, as both a prosecutor and law clerk, Walker worked on cases involving corrupt law enforcement officers, multi-county drug rings and criminal street gangs. Walker was the Attorney General's lead prosecutor on South Carolina's first successful trial utilizing the states newly adopted criminal gang laws; while prosecuting gang cases in Richland County, Walker accepted a position as an Assistant Solicitor with the Fifth Judicial Circuit (Richland and Kershaw Counties).

As an Assistant Solicitor, Walker worked primarily in the Columbia, SC office. In her six years with the office, Walker tried twenty-five cases to jury verdict with her primary focus being on violent crime. In February of 2018, Walker was named Executive Director of the South Carolina State Ethics Commission. As Executive Director, Walker hopes to aid all South Carolinians in understanding the Ethics Act while fairly enforcing the Act.

Walker is a member of the South Carolina Bar and the Columbia Chapter of The Links, Inc.



Speaker Biographies

THE SOUTH CAROLINA FREEDOM OF
INFORMATION ACT: GOVERNMENT IN THE
SUNSHINE OR IN THE FISH BOWL?



**David T. Duff, Esquire,
*Duff Freeman Lyon, L.L.C.***

David T. Duff is senior partner in the Columbia school law firm of Duff Freeman Lyon, LLC. Dave is a graduate of Kenyon College and NYU Law School. He has practiced education law for over 20 years and is a frequent presenter on

public education topics important to school board members, like the S.C. Freedom of Information Act.

SCHOOL FINANCE 101

**Lyde Graham, *Director of
Operations, Clarendon School
District 2***

J. Lyde Graham, III, CPM, Director of Operations, Clarendon County School District 2 Lyde Graham has over 24 years of experience in public service. Previously, Graham was an Officer in the U.S. Air Force culminating as a Captain and Section Commander in a Fighter Squadron. Subsequently to his service, he served as a Center Administrator for Pee Dee Mental Health Center (SCDMH) for seven years.

For 12 years Graham has been the Chief Financial Officer, Chief Operations Officer for Williamsburg County School District, Clarendon County School District One, Darlington County School District, Lee County School District, and Lexington School District 4. He has served as President of the South Carolina Association of School Business Officials.

He received a Bachelor's of Science in Business Administration with a concentration in Accounting from The Citadel. He is a Certified Public Manager and has completed all coursework for the GFOA Government Finance Officer Program at the University of South Carolina.



THURSDAY

June 4, 2020

9 a.m. - 3 p.m.



Who to call

800.326.3679

We welcome your calls and e-mails. Call toll-free. After hours, dial the extension to leave a voice mail.

SCSBA

Scott Price, Executive Director

Extension 0259, sprice@scsba.org

chief executive officer, individualized district studies (curriculum, organizational, salary, etc.), superintendent search

Judy LeGrand, Executive Assistant and Superintendent Search Coordinator

Extension 0226, jlegrand@scsba.org

liaison to SCSBA board of directors

Rodney Nixon, IT Manager

Extension 0241, rnixon@scsba.org

Ranae Mack, Receptionist

Extension 0220, rmack@scsba.org

Melissa Donald, Director of Finance

Extension 0238, mdonald@scsba.org

Susan Hagedorn, Office Operations and Accounting Manager

Extension 0234, shagedorn@scsba.org

Debbie Elmore, Director of Governmental Relations and Communications

Extension 0224, delmore@scsba.org

advocacy services, legislative services, referendum information

Becky Bean, Communications Manager

Extension 0227, rbean@scsba.org

awards and recognition, board data, media relations, publications, website (scsba.org)

Erin Hughes, Administrative Assistant

Extension 0261, ehughes@scsba.org

SCSBIT

Steve Mann, CPA, Director of Insurance Services

Extension 0254, smann@scsba.org

risk control services, self-insured property & casualty program, self-insured workers' compensation program

Jennifer Ayers, Administrative Assistant

Extension 0256, jayers@scsba.org

Sheri Miracle, Office Assistant

Extension 0221, smiracle@scsba.org

Gwen J. Hampton, MSW, CMP, Director of Leadership Development

Extension 0251, ghampton@scsba.org

annual convention, association workshops/conferences, board assessments, Boardmanship Institute, on-site training

Blair Warren, Conference Service Associate

Extension 0260, bwarren@scsba.org

Stacy Ruff, Administrative Assistant

Extension 0223, sruff@scsba.org

Dr. Tiffany N. Richardson, General Counsel and Director of Policy and Legal Services

Extension 0258, trichardson@scsba.org

Rachael O'Bryan, Administrative Assistant

Extension 0233, robryan@scsba.org

Emma Brody, Paralegal

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Property & Casualty

Kim Anderson, Asst. Dir., Property and Casualty

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Nicky Shova, Administrative Assistant

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Risk Control

Tim Hinson, CPSI, Risk Control Manager

Extension 0248, thinson@scsba.org

Workers' Compensation

Danny Deal, Asst. Dir., Workers Comp.

Extension 0240, ddeal@scsba.org

South Carolina School Boards Association

111 Research Dr., Columbia, SC 29203 | 800.326.3679

scsba.org • scsbit.org

SECTION 59-19-45. Orientation for school district boards of trustees and county boards of education.

(A) Within one year of taking office, all persons elected or appointed as members of a school district board of trustees after July 1, 1997, shall complete successfully an orientation program in the powers, duties, and responsibilities of a board member including, but not limited to, topics on policy development, personnel, superintendent and board relations, instructional programs, district finance, school law, ethics, and community relations.

(B) The orientation shall be approved by the State Board of Education and conducted by public or private entities approved by the State Board of Education such as the South Carolina School Boards Association.

(C) The provisions of this section also apply to members of county boards of education appointed or elected after July 1, 1997, in the same manner the provisions of this section apply to members of school district boards of trustees.

(D) The provisions of this section do not apply to a school board trustee or county board of education member who was serving in such office on July 1, 1997, and who is continuously reelected or reappointed to office thereafter.

(E) The State Department of Education shall reimburse a school district or county board of education conducting an orientation for a new board member as required by this section at the rate of eighty dollars for a member, provided that the total reimbursements by the department in one fiscal year must not exceed ten thousand dollars. If the total projected cost of these reimbursements for a year as determined by the department exceeds ten thousand dollars, the eighty-dollar reimbursement for each new member must be reduced proportionately. If funds are not available for these reimbursements, the board member orientation is not required but may be conducted at the option of a school district or county board of education. The State Board of Education shall establish guidelines and procedures for these reimbursements.

(F) The State Department of Education must keep a record of the school board trustees who complete the orientation program.

SCSBA mission

To be the leading voice advocating for quality public education while ensuring excellence in school board performance through training and service.

2018–2019 Annual Report

During the 2018–2019 year, SCSBA focused its efforts on equipping our members to be #SchoolBoardStrong as the leading voices for public schools. This was especially important because education reform made headlines as a major education bill moved through the House and Senate, promising drastic changes to K12 education, impacting teacher pay, accountability and school choice. These changes also extended to school boards who were being targeted with increased requirements, including new ethics rules only for school board members, mandatory training and nepotism policies, school district takeovers, forced consolidations and more.

In March of this year, Lexington County School District Two School Board Member and SCSBA Past President ElizaBeth “Beth” Dickerson Branham became the first South Carolinian to hold the office of National School Boards Association President when she was sworn in during the organization’s annual delegate assembly on Friday, March 30, 2019, in Philadelphia.

SCSBA maintains its presence as a unified voice for public education, providing board services across the state and representing the statewide interest of public education through legal, political, community and media advocacy.

Following is a snapshot highlighting SCSBA’s efforts this year — some quietly behind the scenes and others highly publicized — but all aimed at promoting and supporting local school boards as the voice for public education.

LEADERSHIP DEVELOPMENT — KEEPING YOU AHEAD OF THE CURVE

- SCSBA recognized school board members throughout the state for achieving one of six levels in the 2018-2019 year with certificates of achievement and a lapel pin designating their level of accomplishment in the Boardmanship Institute.
- SCSBA recognized 14 school board members for achieving level six, the highest recognition in the Boardmanship Institute. To qualify, level six recipients must earn at least 300 points for



Scott Price, *Executive Director*



Gwen Hampton, MSW, CMP, *Director of Leadership Development*

participation in training sessions over the past five years or less and pass a written exam.

- SCSBA staff visited eight school districts across the state, working with school boards to enhance effective board governance practices.

POLICY AND LEGAL SERVICES — EFFECTIVE GOVERNANCE STARTS HERE

- The Policy and Legal Services department provides training in specialized areas such as Boardmanship 101, FOIA, Parliamentary Procedures and Meeting Management, Policy Revisions, and Ethics by request.
- SCSBA continues to contract with school districts for specialized, fee-based policy projects. These include 24 ongoing policy manual overhauls, policy audits and reviews and policy manual re-coding work.
- The number of school boards that are subscribing to the policies online services continues to grow, with 71 districts and special schools currently using online policy manuals.



*Dr. Tiffany Richardson, Esquire,
General Counsel and Director
of Policy and Legal Services*

LEGISLATIVE REPRESENTATION — #SCHOOLBOARDSTRONG

This past year, SCSBA continued to advance the voices of locally-elected and appointed school board members through our legislative advocacy services. We remain committed to ensuring that the local school board voice is heard in every public policy forum in which education decisions are made or influenced.

Lobbying and advocacy efforts at the State House resulted in an increase of more than \$250 million in new revenue for K12, much of which included the following:

- about \$160 million to raise the starting teacher pay from \$32,000 to \$35,000 and a 4 percent teacher pay raise;
- more than \$80 million allocated to the state Commerce Department and to the Department of Education to attract jobs and fix crumbling infrastructure and facilities in the state's school districts with the lowest tax base; and,
- decreased state standardized testing.

SCSBA spent much of the legislative session reviewing and working for changes to an 80-plus page education reform bill that sailed through the House but is being more cautiously considered in the Senate. This legislation will likely be taken up quickly when lawmakers return in 2020.



*Debbie Elmore, Director of
Governmental Relations and
Communications*

The advocacy efforts of member districts saw an increase, with nearly half of the 600-plus school board members throughout the state participating in the lobbying of federal and state lawmakers at our Two Days At The Capitol (2DAC) events and the annual advocacy day in Washington, D.C.

It was another exciting year of Regional Advocacy Meetings, where participants discussed the growing oversight of the state in K12 education, including state takeover of districts, the removal of school boards and mandated consolidation, and the growing teacher shortage crisis. Participants were asked to offer their thoughts and ideas on how to ensure the role of school boards remain strong.

COMMUNICATIONS — KEEPING SCHOOL BOARDS FRONT AND CENTER

- The “Get on Board” guide outlining school board member roles and responsibilities was updated this year. This handbook includes information to assist school board members in their important role as they lead their district in fulfilling its vision and mission.
- An Advocacy Toolkit was released in conjunction with the Regional Advocacy Meetings and was intended to complement board and board member efforts by providing a guide to assist in lobbying local, state and federal officials on behalf of South Carolina’s outstanding public schools and students.
- SCSBA organized a “Local Voice, People’s Choice” School Board Recognition Press Conference this year in January at the State House recognizing the important role that school board members play in our state. This event got statewide media coverage and was well attended by local legislators and school board members. Governor Henry McMaster also signed a resolution officially declaring January as School Board Recognition Month in South Carolina.
- School boards across the state signed poster-sized copies of the South Carolina School Board Member Ethical Principles during the month of January. This project served as a symbolic gesture by school boards, publicly stating that they will uphold these effective governance principles. This project brought much deserved attention and recognition to school boards by media and in local communities.
- SCSBA provided school boards with several opportunities to boost their online presence on sites such as Facebook and Twitter, including a back to school social media activity where board members welcomed students and staff back to school using the hashtag #SchoolBoardStrong.



Melissa Donald, *Director of Finance*

SCSBIT — MEMBERSHIP IS OUR STRENGTH

- The SC School Boards Insurance Trust (SCSBIT) continues to serve the majority of school districts for both property and casualty coverage along with workers' compensation coverage.
- The Property and Casualty Trust currently insures approximately \$14.9 billion in school properties and serves 430,000 students. The P & C Trust currently has 50 school district customers representing 63% of districts across the state. Some of the coastal districts remain insured by the State of South Carolina as SCSBIT rates these areas as higher risk for property losses and premiums are generally lower with the State. However, SCSBIT does have some coastal exposure including Georgetown and Beaufort school districts.
- SCSBIT continues to mitigate risk by purchasing reinsurance in the domestic, Bermuda, and London markets. The self-retention of losses retained by SCSBIT is \$150,000 with the reinsurance paying all losses after that. The latest audited financials on June 30, 2017, for the property and casualty trust fund reflect a net position of \$30.3 million with the June 2019 audit yet to be released.
- School districts across the state received \$1,227,551 for Workers' Compensation Risk Control Grants for the 2018-2019 fiscal year. The grants are used in an effort to improve safety and to help control costs by implementing preventive measures for our member school districts that have workers' compensation insurance with SCSBIT.
- SCSBIT continues to keep its entire qualified and professional staff, ensuring that customer service remains second to none. The latest audited financials on June 30, 2017, for the workers' compensation trust fund reflect a net position of \$33.8 million. The investment income earned from both funds helps to offset premiums for member districts. The workers' compensation trust insures 59 school districts which represents 75% of all SC Districts.
- SCSBIT is rolling out a new product called STOPit for its property and casualty customers. STOPit is an anonymous reporting system that allows students and staff the ability to report bullying, inappropriate sexual situations, and other matters on their cell phones or on a laptop computer. The product is being made available effective July 1, 2019 and is voluntary.



Steve Mann, CPA, *Director of Insurance Services*

SCSBIT remains the choice of school districts across the State of South Carolina. Commercial brokers continue to change insurance providers in an effort to lower premiums and earn more profit. SCSBIT continues to offer exceptional service and remains the insurer that the majority of school districts place their insurance coverage with.

At your service.

What does my board get for its SCSBA dues?

Membership Services

Your board as a member of the South Carolina School Boards Association receives the representation, consultation, information and assistance described on this page as part of your membership dues.

As a member board, you also have access to the Boardmanship Institute's statewide workshops and to a variety of services customized for your district's particular needs. These usually are fee-based services, such as superintendent searches and board retreats.

Membership also gives each board member a \$100,000 accidental death and dismemberment policy.

Your SCSBA membership enables you to participate in all of the National School Boards Association activities and in the self-insured workers' compensation and property and casualty programs administered by the South Carolina School Boards Insurance Trust.

Legislative representation:

Federal, state & local

- Daily representation at the State House and updates during the session
- Testimony on proposed legislation affecting public education
- Assistance with drafting legislation
- Representation at key legislative committees: Education, Ways and Means, Finance
- Legislative Update, a bi-weekly paper newsletter, January through June
- Alerts on important legislation
- Statewide network of school board legislative contacts
- Grassroots advocacy initiative
- Federal Relations Network of South Carolina school board members
- Friends of Education Coalition representation
- Monitoring of state policymaking meetings

Legal services

- Ethics questions
- Freedom of Information Act issues
- Legal first aid
- Legal workshops

Access to self-insured risk management services

- Property & Casualty insurance
- Workers' Compensation insurance
- Risk control services

Training for boards

- The Basics of Boardmanship on-site training
- New board orientation

Communications

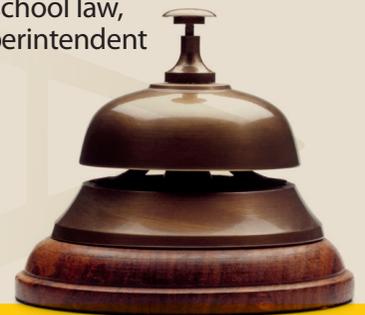
- e-Clippings, a daily electronic newsletter featuring educational & political stories across the state
- Focus, a biweekly paper newsletter
- e-Focus, a weekly electronic newsletter
- SCSBA Web site, www.scsba.org

Other membership services

- Information on school boards and educational issues
- Policy services
- Special reports and studies
- Teleconferences
- Telephone consultation
- Awards & recognition programs

Let the SCSBA staff work with your board and your district on board assessments and retreats, policy, communications, school law, referenda campaigns, superintendent evaluations and searches.

Please give us a call at **800.326.3679** or visit us online at **www.scsba.org**



Board and Board Member Standards

for effective school board governance

Board Standards:

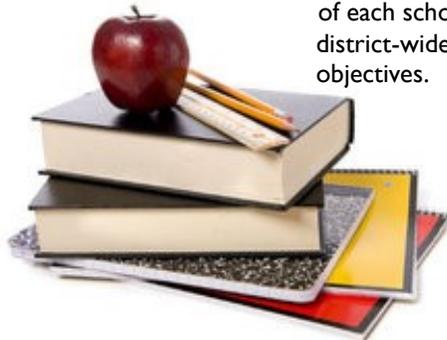
The board will:

Serve as an Advocate for Children and Public Education

- ◆ Place children's needs ahead of personal or political gain.
- ◆ Demonstrate a sincere and unselfish interest in public education.
- ◆ Promote a positive image of schools in local media.
- ◆ Make decisions based on what is good for all children in the district.

Communicate a Clear Vision

- ◆ Establish a district-wide vision for education with board community involvement.
- ◆ Set clear priorities among district goals consistent with the district's mission and values.
- ◆ Ensure that the rules, roles and responsibilities needed to realize the district's vision are in place.
- ◆ Monitor regularly progress toward achieving the district's vision, making adjustments as needed.



Act with Fiscal Responsibility

- ◆ Work to ensure adequate resources are distributed equitably to schools, staff and students.
- ◆ Ensure written policies for efficient administration of purchasing, accounting and payroll procedures.
- ◆ Monitor budget expenditures regularly.
- ◆ Keep the community informed about the financial needs of the district and invite public input during the budget process.

Monitor Student Achievement

- ◆ Ensure that the district sets standards and measures achievement relative to those standards.
- ◆ Make achievement of stated academic, social and behavioral goals a clear priority.
- ◆ Understand the instructional program and its relation to the laws and regulations established by the legislature and the State Board of Education.
- ◆ Obtain evidence of progress of each school toward district-wide goals and objectives.

Understand and Respond to Community Needs

- ◆ Maintain open and constructive relations with the community at large.
- ◆ Ensure a comprehensive community relations policy and an authorized spokesperson.
- ◆ Seek input of parents, community groups, service organizations and local governing bodies on important matters.
- ◆ Maintain visibility, participating actively in school and community affairs.

Conduct Professional Meetings

- ◆ Conduct meetings in a businesslike manner, following acceptable parliamentary procedures.
- ◆ Consider both information and action items at its board meetings and allow sufficient time for discussion.
- ◆ Insist that its members are polite and treat each other, school personnel and the public with respect during board meetings.
- ◆ Ensure that time spent on each agenda item is appropriate in terms of its importance.

Support the Superintendent and Administrative Staff

- ◆ Provide the superintendent a clear statement of its expectations for his/her performance that is used in his/her evaluation.
- ◆ Work with the superintendent to achieve a climate of good faith and good will through team work and clear communication.
- ◆ Display confidence in the superintendent by making decisions concerning the district after considering the superintendent's recommendations.
- ◆ Discuss immediately matters likely to alienate either board members or the superintendent.

Avoid Micromanagement

- ◆ Operate according to written policies that it updates as necessary.
- ◆ Avoid using its authority outside of board meetings.
- ◆ Concentrate on developing policies and allow the superintendent to administer them.
- ◆ Follow its prescribed role as a policy body and not become involved in making administrative decisions.

Board Member Standards

As individual school board members, we will:

Act Ethically

- ◆ Exhibit good character and self-discipline.
- ◆ Avoid conflict of interest between our public position, our professional career and our private life.
- ◆ Avoid using board membership or any particular issue for personal gain.
- ◆ Understand that, under law, the school board acts as a board and that individual board members have no authority except when the board meets.

Demonstrate Courage

- ◆ When needed, engage in open, frank discussions with other board members.
- ◆ Avoid making decisions on the basis of single-issue pressures.
- ◆ Speak and vote our conscience, but support majority decisions.
- ◆ Work with special interest groups in a way that is fair both to these groups and to the public at large.

Work as A Team Player

- ◆ Avoid committing the board to a position with our public comments except when board policy is already clearly established.
- ◆ Work willingly through defined channels of authority and responsibility.
- ◆ Not let disagreement with other board members on an issue affect our vote on other issues.
- ◆ Pay attention to the ideas and opinions of other board members.

Communicate Effectively

- ◆ Communicate with our constituency on a regular basis.
- ◆ Use effective and appropriate channels of communication with the superintendent and his/her administrative staff.
- ◆ See that public is informed of significant educational issues.
- ◆ Display good listening skills.

Make Sound Decisions

- ◆ If new issues surface at a board meeting, give the superintendent sufficient time to study those issues so the board is not forced to make a decision on the spot.
- ◆ Realize that priorities must be established and used to make sound and defensible decisions.
- ◆ Think independently, gain knowledge and rely on fact rather than hearsay in making decisions.

Stay Informed

- ◆ Become knowledgeable of new and ongoing educational programs in the district's schools.
- ◆ Have sufficient knowledge and skills to review and suggest revisions in board policy.
- ◆ Attend meetings, workshops and seminars that contribute to knowledge and understanding of education.
- ◆ Know and follow district and state regulations and policies concerning education.

Devote Sufficient Time to Duties

- ◆ Come to board meetings prepared.
- ◆ When appropriate, work closely with other governmental agencies and bodies.
- ◆ Devote the time necessary to be an effective board member.
- ◆ Attend all board meetings unless emergency situations arise.



Board Work

How to stay focused: Foundational principles

As the corporate entity charged by law with governing a school district, each school board sits in trust for its entire community. The obligation to govern effectively imposes some fundamental duties on the board.

1. The board clarifies the district purpose

As its primary task, the board continually defines, redefines and articulates district goals to answer the recurring question – who gets what benefits for how much?

- Goals express the school board’s vision for the school district – its purpose – and provide the entire organization with clear direction. School boards rarely “create” district purpose; rather, they most often “detect” it through listening and observing.
- In effective school districts, each and every part of the organization is aligned with the ends specified by the school board.
- Well-crafted ends permit the school board to monitor district performance and hold the organization accountable.

2. The board connects with the community

The school board engages in an ongoing two-way conversation with the entire community. The purpose of the conversation is to enable the board to hear and understand the community’s educational aspirations and desires, to serve effectively as an advocate for district improvement and to inform the community of the district’s performance.

- Communications should create the trust and support among community, board, superintendent and staff, which are essential for an effective educational system.
- The school board typically must be aggressive in reaching out to the community to engage people in conversations about education. In contrast, people with customer complaints will seek out board members.
- A board in touch with community-wide concerns and values will serve the broad public interest and be less influenced by narrow special interests.

3. The board employs a superintendent

The board employs and evaluates one person – the superintendent – and holds that person accountable for the performance of the school district. The board delegates authority for employing and evaluating district staff to the superintendent.

- The employment relationship between a school board and superintendent consists of trust, mutual respect and a clear understanding of respective roles and expectations. The basics of

this relationship are reflected in a thoughtfully crafted employment contract, a job description and procedures for communications and assessment.

- The superintendent is held responsible for hiring and supervising all other staff, subject to limits established by the board.
- Hiring a new superintendent is one of the most important and challenging tasks that can ever face a school board. Just as important and just as challenging is maintaining a productive relationship with the incumbent superintendent. Both tasks call for the school board's best efforts.

4. The board delegates authority

The board delegates authority to the superintendent to manage the district and provide leadership for the staff. Such authority is communicated through written policies that define operating limits.

- Ultimately the school board is responsible for everything, yet must recognize that everything depends upon a capable and competent staff.
- Delegating authority to the superintendent empowers the staff to pursue board goals with focus. Boards that do (or re-do) staff work, leads to their disempowerment.
- Delegation is difficult for anyone accustomed to direct action. However, to adequately see the big picture and avoid disorienting the staff, members of the school board must discipline themselves to trust their staff and stay away from day-to-day matters.

5. The board monitors performance

The board constantly monitors progress toward district ends and compliance with written board policies.

- A school board that pursues its ends through the delegation of authority has a moral obligation to itself and the community to determine whether that authority is being used as intended.
- Unless the board is clear about what it wants, no valid way exists to measure progress.
- The constructive use of data is a skill that must be learned. The board should have some understanding of data but will typically require guidance from the staff.
- A distinction can be made between monitoring data (for board accountability) and management data (of more use to the staff than the board).

6. The board takes responsibility for itself

The board, collectively and individually, takes full responsibility for board activity and behavior. Board deliberations and actions are limited to board work, not staff work.

- The school board's role as trustee for the community cannot be filled by any other person or group.
- While the board operates within restrictive legal parameters, the board is responsible for itself. Avoidance of staff work, for example, depends upon its own discipline.
- Quality boards seek continuity of leadership, even as they experience turnover in membership. Such boards depend upon written rules and standards, thorough orientation and training for all board members and the creation of opportunities for new school leaders to develop in the community.



south carolina school boards association

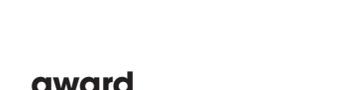
boardmanship institute

levels of achievement

Established in 1982, SCSBA's Boardmanship Institute offers a year-round training curriculum focused on leadership skills for board members on state and national educational issues. Board members are recognized for reaching each of six levels.



level	points	time	award
1	25	1 year	Certificate
2	40	1 year	Certificate, silver pin
3	100	2 consecutive years or less	Certificate, gold pin
4	200	4 consecutive years or less	Certificate, pin (blue stone)
5	300	5 consecutive years or less	Certificate, pin (red stone)
6	300	Receive Level 5 recognition previous year and pass online test	Plaque, pin (clear stone)



Boardmanship Institute Levels 1-5 are presented to board members at the district during a board meeting. Level 6, the highest level of recognition, is awarded during SCSBA's Annual Convention.

Board members who have a break in service will start over in the Boardmanship Institute.