



**south carolina school boards association**

# **get on board**

**your service as a school  
board member**

# The Roles and Responsibilities of a School Board Member

Welcome: Let's get on board! .....	1
Four roles of school boards.....	2
Oath of Office .....	3
Ethical Principles .....	4
As an individual board member .....	5
As a board.....	7
Powers and duties.....	9
Training and development.....	10
Policymaking .....	12
Working as a team .....	13
Fiscal responsibility .....	14
Communication.....	17
Advocacy.....	18
Meeting management .....	19
Freedom of Information Act (FOIA).....	20
Other resources .....	21



# Let's get on board!

**The South Carolina School Boards Association congratulates you on being elected to serve on your local school board. We applaud your willingness to dedicate yourself to serve the children of your community.**

Serving as an effective school board member today requires time, a sincere interest in public education and a commitment to improving learning for all children.

This handbook includes information to assist you as a school board member. We hope you will find this overview of your roles and responsibilities to be valuable as you help lead your district in fulfilling its vision and mission.

The South Carolina School Boards Association (SCSBA) is here to support you. We serve as a source of information and as a statewide voice for boards governing the 70 public school districts.

Services include a year-round training program known as the Boardmanship Institute, legislative advocacy, publications, policy services, superintendent searches and a variety of on-site customized services for school boards. Find more information about SCSBA services [here](#).

Please don't hesitate to contact us if we can be of any assistance. Thank you for your commitment to school board service.

**scsba.org**  
**facebook.com/scsba**  
**twitter.com/scsba**

**effective  
governance  
starts  
here**

**south carolina school boards association**

**policy and  
legal services**

*on-site training for boards and  
administrative staff on current policy  
and legal issues*

**Contact**  
**Rasheeda Cleveland**  
 for more information  
 rcleveland@scsba.org 803.799.6607

# Four roles of school boards

## Vision

### Creating a shared vision

- Keep students as the focus of schools.
- Adopt a shared vision based on community beliefs to guide local education.
- Demonstrate a strong commitment to the shared vision and mission of the board by using them to guide decision making and by communicating to others.

## Accountability

### Measuring and communicating the vision

- Measure the performance of all school staff members, administrators and the board itself against student achievement objectives.
- Track progress continually and report results honestly.
- Receive regular reports on student progress and needs based on a variety of assessments in order to ensure the quality and equity of education in the district.
- Evaluate both superintendent and board performance.
- Evaluate progress towards achievement of district long- and short-term goals and ensure that policies and allocation of resources effectively support district vision.
- Report district progress to the community and parents.

## Structure

### Applying the vision

- Employ a superintendent who assures a district management system which enables all people to contribute meaningfully to achieve the vision.
- Establish district policies and guidelines for the effective operation of the district.
- Ensure that long- and short-term plans are developed and annually revised through a process involving extensive participation, information gathering, research and reflection.
- Make decisions which support student learning and school renewal when the board receives and adopts policies and allocates resources.
- Approve high instructional standards in line with the district's vision and state standards.
- Encourage an environment for innovative teaching and learning.

## Advocacy

### Championing the vision

- Seek other input from those who can help expand educational opportunities to meet the needs of the whole child.
- Encourage strong relationships with parents and the community to support students and families.
- Lead in celebrating the achievements of students and others in education.
- Promote school board service as a meaningful way to make long-term contributions to society.
- Model behavior that emphasizes trust, teamwork and shared accountability.



# Oath of Office

**I do solemnly swear (or affirm) that I am duly qualified, according to the Constitution of this State, to exercise the duties of the office to which I have been elected (or appointed) and that I will, to the best of my ability, discharge the duties thereof and preserve, protect and defend the Constitution of this State and of the United States, so help me God.**

*– (S.C. Constitution, Art. III, Sect. 26)*

## what's new



south carolina school boards association

**annual policy  
and legal service  
update**

*providing you with legislative and legal changes, policy updates and publications on the latest hot education topics throughout the year*

---

**Contact**  
**Rasheeda Cleveland**  
 for more information  
[rcleveland@scsba.org](mailto:rcleveland@scsba.org) 803.799.6607

## south carolina school board member

# ethical principles

As a member of my district's school board I pledge my efforts to improve public education in my community and will solemnly try to:

- represent the interests of the entire district when making decisions and to rely on available facts and on my judgment rather than on individuals or special interest groups;
- understand the proper role of the board to set policies governing the district and to hire the chief administrative officer to carry out these policies;
- encourage an open exchange of ideas by all board members during the decision-making process;
- seek regular communications between the board and students, staff and all segments of the community;
- attend all board meetings, to study issues facing the board and to enact policies and official actions only after full discussion at such meetings;
- work with other board members in a conscientious and courteous manner befitting the public trust placed in the position of school board trustee;
- communicate concerns and public reaction to board policies and school programs to the superintendent and other board members in a professional manner;
- support employment of the persons best qualified for staff positions and to ensure a regular and impartial evaluation of all staff;
- avoid conflicts of interest and to refrain from using my board positions for personal or partisan gain;
- encourage recognition of the achievements of students and staff and of the involvement of community residents;
- support legislation and funding which will improve the educational opportunities and environment for students and staff;
- take no individual action which would compromise the integrity of the board or administration and to respect the confidentiality of information that is privileged under the Freedom of Information Act;
- study current educational issues and to participate in training programs such as those offered through the South Carolina School Boards Association; and
- make my district's educational setting the best possible to encourage all students to achieve and to love learning.

**Download in printable PDF file format by clicking [here](#).**

Adopted by the 1986 SCSBA Delegate Assembly



# As an individual board member...

## Ethics

### Act ethically

- Exhibit good character and self-discipline.
- Avoid conflict of interest between your public position, your professional career and your 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 acting as a board.

## Teamwork

### Work as a team player

- Avoid committing the board to a position without public comments except when board policy is already clearly established.
- Work willingly through defined channels of authority and responsibility.
- Don't let disagreement with other board members on an issue affect your vote on other issues.
- Pay attention to the ideas and opinions of other board members.

## Courage

### 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 with conscience, but support majority decisions.
- Work with special interest groups in a way that is fair both to all groups and to the public at large.

## Communication

### Communicate effectively

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

*Continued on next page...*

## Decisions

### 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 facts rather than hearsay in making decisions.
- Insist on a clearly defined decision-making process for the entire board.

## Information

### 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.

## Duties

### 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.

The board has the authority to act only when a quorum is present at a legal meeting of the board. Because all powers of the board of trustees lie in its action as a group, individual board members exercise authority over district affairs only when voting to take action. Individually, you as a board member have no authority. You have legal power only when you sit with the board in a public meeting.

The board and its members deal with administrative services through the superintendent and don't give orders to any subordinates of the superintendent either publicly or privately, but may make suggestions and recommendations.

Questions, requests, complaints and other information presented to individual board members outside of a board meeting by members of the public should be referred to the superintendent.

The board will make its members, district employees and the public aware through its actions and policies that only the board acting as a whole has authority to take official action.

The members of the board of trustees are officers of the state. Constitutional provisions which apply to officers apply to school board members.



# As a board

## Together your school board should:

### 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 broad 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.
- Regularly monitor 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 that written policies are set 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 high academic standards and measures achievement relative to those standards.
- Make achievement of stated academic, social and behavioral goals a clear priority.
- Understand instructional programs and their 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.

*Continued on next page...*

# make the right choice!

south carolina school boards association

## superintendent search

*Let the South Carolina School Boards Association handle the logistics of your superintendent search.*

For more information, contact

**Scott Price**  
[sprice@scsba.org](mailto:sprice@scsba.org)  
 803.799.6607

## Understand and respond to community needs

- Maintain open and constructive relations with the community at large.
- Ensure a comprehensive community relations policy and have 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 board meetings and allow sufficient time for discussion.
- Insist that 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 with a clear statement of the board's expectations for his/her performance that will be 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 and update as necessary.
- Avoid using 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.

The board's powers are derived from the state constitution and acts of the general assembly. Consequently, the board may perform only those acts for which some authority exists. This authority may be expressly stated or implied either in state law or in rules and regulations of the State Board of Education.

Local school boards are elected—or occasionally appointed—to be leaders and champions for public education in their states and communities.

The board is responsible to the community it serves and represents. It is the duty of the board to carry out the will of the community in matters of public education, within the boundaries set by the laws and regulations of the state of South Carolina and their county.

All powers of the board lie in its action as a governing body. Board members acting as individuals have no authority over personnel or school affairs except when such authority is specifically delegated to a member by the board.

The board has four principal roles:

- to set the vision by looking ahead and planning for the district's future
- to assure a basic structure so that the district operates according to sound policies and budgeting procedures
- to ensure accountability for student and staff performance and for district resources
- to serve as an advocate for the children in your schools

The board also hires a superintendent who serves as the district's chief executive officer, responsible to the board for the day-to-day operations.

*BB— Board Legal Status*



# Powers and duties

**South Carolina state law has specified certain powers and duties of local school boards (SC 59-19-90). Some of the mandatory and assigned duties include:**

## **Legislative/Polymaking**

The legislative authority includes policymaking action and the review of rules and regulations established to put policies into operation. The board is responsible for the development and adoption of policy. The policies will be put in written form and continually re-evaluated in terms of the changing needs and functions of public education.

## **Executive**

The board will employ a superintendent to serve as the chief executive officer. In that role, the superintendent performs administrative duties for the board by virtue of the powers delegated to him/her. The board will hold the superintendent accountable for the proper and efficient administration of the district.

## **Quasi-Judicial**

The board serves in a quasi-judicial function when it acts on appeals of parents/legal guardians, students or employees on decisions made by the superintendent or his/her designee.

## **Appraisal and Approval**

The board is responsible for evaluating the effectiveness of its policies and the implementation of its policies.

## **Educational Planning and Evaluation**

The board is responsible for establishing educational goals which will guide both the board and the staff in working together toward the continued improvement of the educational programs in the district.

## **Provision of Financial Resources**

The board will adopt the annual budget which will provide the resources in terms of facilities, personnel, materials, equipment and programs to enable the school system to carry out its mission.

## **Public Relations**

The board is responsible for providing adequate and direct means for keeping the community informed about the school district and for keeping itself and the staff informed about the wishes of the public.

keeping you  
ahead of the  
**curve**



south carolina school boards association  
**boardmanship  
institute**

*SCSBA's Boardmanship Institute offers a year-round training curriculum focused on leadership skills for board members on state and national educational issues.*

Contact Gwen Hampton for more information  
ghampton@scsba.org 803.799.6607

# Training and development

**New Board Orientation** is the only state-mandated training for newly-elected school board members. South Carolina law mandates that all new board members attend an orientation training within one year after being elected or appointed. Participants in SCSBA's New Board Orientation are in compliance with this requirement.

However, the SCSBA established the **Boardmanship Institute** in 1982, offering a year-round training curriculum focused on leadership skills for board members on state and national education issues.

Board members earn points for participating in statewide conferences and on-site training in their district.

The Boardmanship Institute's six levels of recognition are based on points accrued annually.

Boardmanship Institute Levels 1-5 are presented to board members in 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 must start over in the Boardmanship Institute.

SCSBA staff also conducts customized **on-site board trainings** as a member service. These workshops focus on the roles and responsibilities of school board members, board-superintendent relations, policy and administration, working as a team, Freedom of Information requirements and other legal topics.

## Training calendar download

To download the **Boardmanship Institute calendar** in PDF file format, please [click here](#).

SCSBA regularly provides a variety of trainings, including:

## New Board Orientation

This full-day learning opportunity provides new board members with the foundation they need to become strong leaders in their districts. Presentations cover a range of key topics, and participants have the chance to discuss issues with colleagues from around the state.

## Board Chair Workshop

The full-day Board Chair Workshop addresses the many demands of serving in the top job on your board. Featured speakers and interactive discussions provide insights on such topics as effective meeting management, serving as your board's spokesperson, overall leadership strategies and more.

## Annual Convention

The premiere professional development event of the year offers an impressive collection of educational presentations and experiences! Hundreds of school board members and other education leaders from across the state come together to:

- Learn from state and national experts on topics ranging from board governance to community engagement to innovations in classroom technology.
- Explore areas of particular interest in the diverse slate of breakout sessions.
- Connect with more than 70 education service and product vendors and gain a wealth of ideas and information.
- Enjoy performances by student musical groups from schools around the state.

## DAC (Day at the Capitol)

DAC brings local school board members and other public education advocates from across the state to the State House for face-to-face meetings with House and Senate lawmakers to advocate for a variety of key education issues, including funding reform, flexibility and local control.

## School Law Conference

The SCSBA School Law Conference presents a slate of legal experts and policymakers who provide up-to-date analysis of current issues and guide board members through the often complicated terrain of school policy and law.

*Continued on next page ...*



## Legislative Preview Webinar

Each fall, the SCSBA legislative team hosts a webinar to discuss the education issues likely to be debated when the General Assembly returns in January. An overview of the issues and talking points are provided during the webinar to prepare school boards and other public school advocates for meetings that may occur with local legislators in November or December before the legislative session begins. Board members, administrators and other advocates can view the webinar at their district offices or on a computer at home.

## School Board Administrative Professionals Workshop

This one-day workshop provides an opportunity for the administration personnel that work with school boards to learn emerging trends and effective practices to help keep board operations running smoothly.

## Beyond the Basics

Beyond the Basics is an intense, one-day seminar that will focus on a single trending education topic or issue – one that may be tough, even contentious.

## Legislative Advocacy Conference

The SCSBA Legislative Advocacy Conference and Delegate Assembly sets the stage for all the legislative action that takes place from January through June each year in our state's capitol. Participants learn what will likely be the General Assembly's top education issues from state political, policy and budgetary leaders and find out how their voice can make a difference.

## Risky Business Seminar

The annual Risky Business Seminar, for South Carolina School Boards Insurance Trust member districts only, features information on programs and strategies school districts can take to reduce the risks of workplace accidents and other liabilities.

# by the book

south carolina school boards association

## manual customization

*offering customized board manual revisions including complete recodification, section revisions and more*

**Contact**  
**Rasheeda Cleveland**  
for more information

[rcleveland@scsba.org](mailto:rcleveland@scsba.org) 803.799.6607

# Policymaking

One of the chief functions of the school board is policy making.

The board develops written policies to serve as guidelines for its own operations and for the successful and efficient functioning of the district and schools.

Board policies set a definite course of action and guide the district when making decisions. When the board adopts or revises policy, it responds to the needs of the school district.

Policies should establish "what is to be done, who is to do it and when it is to be done." Administrators provide the "how."

When writing policy, the board should consider the following:

- Policy adoption is the function of the board
- Policy implementation is a function of the superintendent and staff
- Policy review and evaluation is a function of the board and a responsibility of the superintendent

Well-written policies foster a better understanding of board goals and expectations and greatly contribute to consistency across programs and practices. Policies provide the blueprint for the district by establishing the architectural plan of the budget, facilities, operating procedures, organization and personnel, and curriculum. Each division within the plan has a direct influence on students and their achievement. Effective policies align activities within the district with the resources necessary to ensure that students are provided the knowledge and skills to become lifelong learners.

## Characteristics of effective policies

Effective policies should have the following characteristics:

- **Policies must be legally based.** It is essential that legal authorities are referenced appropriately in the policy and cited accurately. As a legal tool, the policy manual is based on federal and state laws and regulations, case law and state board of education regulations.
- **Policies must be comprehensive.** Manuals should consistently cover the programs and procedures of the district. Federal and state laws frequently require boards to enact local policies on subjects for which specific provisions are left to the district's discretion. In those cases, policies must be developed to comply with the legal mandates as well as the district's specific needs. Policies should also reflect best practices for each district.
- **Policies must be up-to-date.** Out-of-date policies can lead to legal liability when they fail to address the needs of the district in this changing society. Keeping policies up-to-date demands an awareness of necessary changes and a convenient method of implementing those changes.
- **Policies must be accessible.** Board policies should be easy to locate for employees, parents/legal guardians and the community. The most convenient way to do this is to post district policies online, which provides an up-to-date version available to anyone with Internet access. Accessibility can be aided by including an index and a table of contents for quick reference.
- **Policies must be easy to understand.** Policies should be written to address the audience. They provide guidance to the district and the community and should not be difficult to read. Policies should be written in layman's language, avoiding unnecessary education or legal jargon.
- **Policies must be practical and workable.** Vague or overly general policies may not give sufficient guidance and too much specificity may plague the district with administrative red tape. Policies should be structured to enable the district to exercise its local discretion while complying with the law and to minimize the risk of legal challenge.



# Working as a team

## Board and superintendent relations

The relationship that exists between a board and its superintendent is an intrinsic part of the educational process within a community. Knowledge of what each can reasonably expect of the other can help substantially in promoting sound working relationships.

The board and superintendent must work together. A board has a responsibility, through its adoption of policy, to direct the superintendent. It then authorizes the superintendent to implement board policies districtwide. The board leaves the day-to-day operations of the district to the superintendent.

A board reviews the superintendent's progress by conducting a regular and systematic evaluation. This challenging role — monitoring, but not interfering — is one that good boards develop with skill and diplomacy.

Superintendents who accomplish exceptional things occasionally make mistakes. Too extreme a reaction to these mistakes ruins a relationship and dampens enthusiasm. This can result in an administrator who pursues the safe course and hesitates to be innovative.

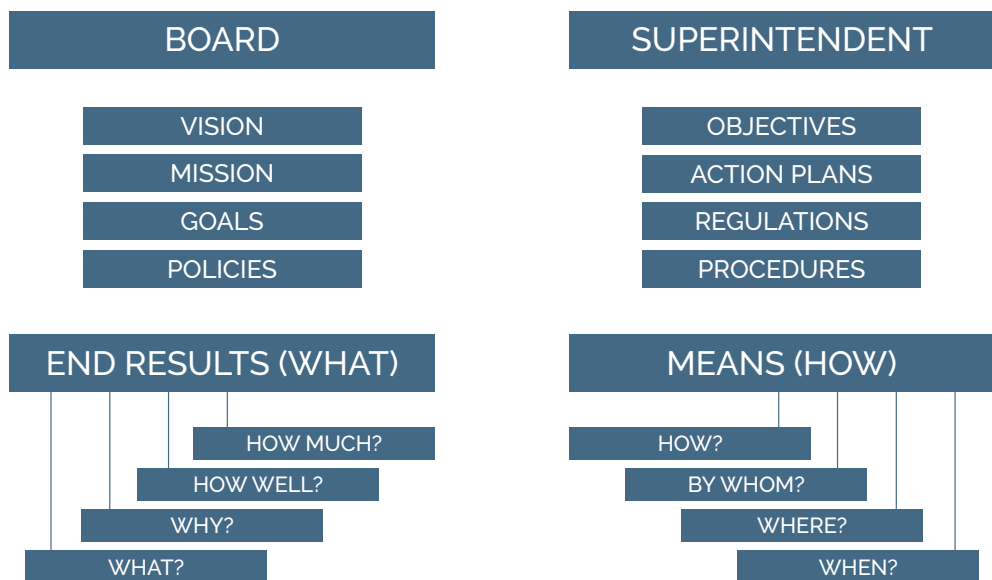
Good board/superintendent relationships take time to develop. Clear communication, mutual respect and an understanding of and respect for each others' roles and responsibilities result in strong relationships.

## Creating board and superintendent agreement

Creating a board and superintendent agreement will reveal whether the superintendent and members of the board share common perceptions regarding decision-making. There will likely be differences of opinion; the board and superintendent will want to share the rationale for their judgments. Effective leadership requires the board and superintendent to abide by the policy so there is no confusion with roles and responsibilities.

## Five ways to handle a decision

1. The **Administration** should make this **routine decision** and not bother communicating with the school board.
2. The **Administration** should make this decision, but inform the board about it **AFTER** the decision is made.
3. The **Administration** should make this decision, but will want to listen to the school board and perhaps other parties **BEFORE** the decision is made.
4. The **School Board** is required by law to take final action on this decision; however, in nearly all cases, the board should **respect the judgment of the Administration**, who will be held accountable.
5. The **School Board** must make this decision and accept responsibility for it (the board will usually expect information and/or a recommendation from the superintendent).



# Fiscal responsibility

## The board is responsible for approving and adopting an annual budget for the school district.

The annual budget is the financial plan for the operation of the school district. The annual budget should express and implement programs and activities of the school district. Planning the budget document is a continuous process. Planning involves long-term thought, study and deliberation by the superintendent, board, administrative staff, faculty and citizens of the district.

The budget provides the framework for both expenditures and revenues for the year. It translates into financial terms the educational programs and priorities for the system.

The board will establish budget priorities for each fiscal year. These priorities will be based upon the needs identified by the superintendent during the budget planning process as determined by the following:

- needs of the district so that all segments of the district programs are treated equitably within the available resources
- state and/or federal legal requirements for funding of programs
- requirements and regulations of the regional accrediting agency
- availability of fiscal and other non-economic resources
- maintenance goal of two month's expenses in the general fund balance from one fiscal year to the next

The superintendent has overall responsibility for budget preparation and will submit an annual budget to the board. Based on the superintendent's recommendation, the board will approve an annual budget.

*Continued on next page...*

## membership is our strength



**south carolina  
school boards  
insurance trust**

**scsbit**

*The insurance partner schools trust. Since 1984.*

*providing workers' compensation  
and property and casualty insurance,  
along with risk control services,  
through a not-for-profit structure*

**Contact Lyde Graham  
for more information**

**lgraham@scsba.org 803.799.6607**



# Questions board members should ask about their district's budget and finances

## General Finance

1. What is the financial condition of the school district?
2. Does the school district have the ability to raise mills to meet its budgetary needs or does county council have to approve the school district's budget?
3. What is the audited fund balance of the general fund?
4. Are current financial projections tracking as planned, and are they in line with the current operating budget?
5. What is the value of a mill for both operating and debt service?
6. What is the assessed value of the school district, and has it been increasing, decreasing or remaining about the same?
7. Student population- What is the Average Daily Membership (ADM) of the school district, and has the ADM been increasing, decreasing or remaining about the same?
8. Facilities- What is the general condition of our facilities? Do schools have excess capacity or are they over-crowded?
9. Debt Service Fund – How much does the district owe in long term debt? Does the district issue general obligation bonds (8% bonds annually) to cover the cost of major maintenance on its facilities?
10. Debt Service Fund- Does the district have a long range facility plan that prioritizes needs of the school district?

## Budget

1. Describe the budget process from inception to finish including estimated dates.
2. Are the school and administrative goals aligned with the district's strategic plan?
3. What is the Base Student Cost (BSC) increasing to and how much additional Education Finance Act (EFA) dollars is the school district projected to receive?
4. How does Act 388 impact the school district? What is the millage cap, and how many mills can the school district request?
5. Is the district projecting any increase in the assessed value for the upcoming fiscal year? If so, how much additional local revenue will that bring in?
6. At what percentage is the state mandated teacher salary increase for next school year set?
7. How does the school district's teacher salary schedule compare with neighboring school districts? Are we having difficulty recruiting teachers to our school district?
8. Does the school district have any difficulties in hiring bus drivers?
9. Is the estimated additional revenue from state and local sources sufficient to cover the increased cost of pay raises and fringe benefits, along with all other operational costs in the general fund?
10. Is the district providing pay increases for all employees in line with the percentages that school teachers are receiving, or do nonteaching staff receive less of an increase?

Continued on next page...

## Accounting Operating

1. Who are the key staff members in the finance department, and what educational/work experience do they have?
2. Has a review of internal controls been completed, and are accounting functions separated to avoid incompatible functions?
3. Are bank statement reconciliations performed in a timely manner?
4. Have cash flow projections been done, and does the district usually have to issue a tax anticipation note (TAN)? If so, when is the TAN usually issued, and what is the range of funds requested?
5. Are budgetary controls in place to prevent the over-hiring of staff members?
6. Financial reporting — Does the Chief Financial Officer (CFO) or Finance Director provide financial statements to the board on a monthly or quarterly basis? Does the CFO discuss the financials at that time to provide school board members with some details as to how the financials are looking as of that time of year?
7. Are budget amendments periodically brought to the board for approval when an expenditure or revenue estimate deviates from what was originally approved?
8. Are deposits made on a daily basis in all areas including food service and pupil activity? What is the process for depositing gate receipts from football games and other athletic events?
9. Does the school district review workers' compensation claims and meet periodically to discuss accident prevention?
10. Investments — Does the district invest idle funds with the State Treasurer's Office Local Government Investment Pool or are idle funds invested another way?

## Audit Questions

1. Was a management letter issued with recommendations by the external auditor? If so, what were the findings and have corrections been made to prevent this from reoccurring?
2. What is the current term for the external auditor? When was the last time a request for proposals was issued for audit services?
3. Does the school district have a procurement code, and are they required by the state to have a review and report issued on purchases annually or every three years? If required, when was the last review done, and what were the results?
4. Does the board have a stated policy as to the size of the fund balance for the general fund? If so, did the auditor review the policy and did the school district finish the year within an acceptable range?
5. Did the finance staff of the school district close the books out, or did the auditor have to make significant audit entries before the audit could begin?



# Communication

## Engaging the community

Positive relationships are the foundation of effective school board work. In order to maintain the support needed for a successful school district, the local board must build productive relationships. As a member of the school board, your key stakeholder groups include the media, elected officials, staff, parents/families, students and the business community. It is important to devote time and attention to relationship building in order to create and maintain positive perceptions about your district and board.

In all dealings with your community and the media, always be:

- Respectful
- Honest
- Deliberate
- Strategic

## Be visible in your community

- Share positive news in the community and with civic groups (Rotary, Chamber of Commerce, faith community, etc.)
- Be involved and be seen
- Get to know your elected officials
- Be accessible

## Working with the media

### Media phone calls and interviews

- **Explain the issue carefully and patiently**  
— Reporters may or may not have a good understanding of the topic

- **Remember “no comment” is a comment**—if you cannot give specifics or discuss, then say that and why (legal issue, respect privacy, etc.)
- **Get to the point** — Capture the essence of what you want to say in the first one to two remarks
- **Keep it simple** — Give clear, simple quotes that can be understood by a wide audience (no acronyms or jargon)

## A board that communicates well

- Responds appropriately to board questions vs. administrative/operations questions
- Speak with one clear, consistent voice on behalf of students and schools — one spokesperson
- Stays on message
- Engages stakeholders and is responsive
- Strives to be proactive instead of reactive
- Stays knowledgeable of Freedom of Information Act (FOIA) laws (open meetings/records).

## When speaking as an individual

- Clarify at the beginning that you are not speaking on behalf of the board
- Consider the impact your comments will have
- Always advise the superintendent when you are going to or have had an interaction with the media

## Three common mistakes that board members make with the media

- Not accessible
- Don't do homework
- Say too much

easy access  
to district  
policies

south carolina school boards association

policies  
online

*providing easy access to district  
policies using policies online*

Contact Rasheeda Cleveland for more information  
rcleveland@scsba.org 803.799.6607

# Advocate... it's your job!

Legislators rely on school board members and their communities to let them know their views on educational issues. SCSBA assists school boards in becoming more informed about legislative issues impacting their schools and being more active leaders in shaping decisions at the state and federal levels.

It's important to remember that state lawmakers will establish education policy, regardless of whether or not you take an active role in the decision-making process. As a school board member, you will better serve your constituents if you help shape policy by participating in the legislative process.

## Why Advocate?

Because local boards of education are part of the political system in South Carolina, and because school board members are elected officials themselves, board members may see themselves as the people making the decisions, instead of trying to influence the decisions. But, there are a number of reasons why school board members cannot function effectively if they ignore the larger political environment.

Under South Carolina law, school boards "manage and control" local schools. School boards do not have "self-executing" powers; any authority is granted by the General Assembly. Likewise, school boards do not have independent authority to raise revenue, unless granted via local legislation.

The General Assembly decides what kinds of taxes or fees school boards can impose and defines the tax base on which school taxes are levied. The legislators may also impose controls on school district budgets and spending through local or statewide legislation. State and federal laws and regulations have a great impact on the management and operation of school districts.

Just a few of the areas affected include: employee rights, benefits and working conditions; building and transportation safety codes; environmental regulations; student and staff civil rights; and investment and accounting practices. The primary responsibility of schools is to educate students. But neither schools nor children exist in a vacuum. Other institutions also touch the lives of children. Local governments deal with the safety of a child's walk to school or provide health services. Other agencies deal with children whose families cannot or will not support them. Disadvantaged or disabled children may need

help that the school alone cannot provide. In each of these cases, the ability of school boards to carry out their mission is affected by decisions made at other levels of government.

*School board advocacy means working to influence those decisions in the interests of local and state education.*


## Advocacy tips for your school board

- Research your legislator's background, committee assignments and voting record on your issues.
- Develop a relationship through consistent communication.
- Invite your legislators to board meetings and to district events, including commencement ceremonies.
- Gather allies from your community to demonstrate broad support for your schools.
- Always be positive and courteous.
- Appoint a Board Legislative Contact (BLC) and provide time during each board meeting for the BLC to discuss recent legislative activity and priorities.
- Set priorities. If everything is important, nothing is important.
- Ensure your board is represented at important meetings and functions.

DOWNLOAD ADVOCACY TOOLKIT

# ADVOCATE!

It's your job!



An advocacy toolkit for school board members from the South Carolina School Boards Association

### WHAT'S INSIDE

What is grassroots advocacy?.....	1
Why advocate?.....	1
Does advocacy by board members really make a difference?.....	2
Tips for effective advocacy.....	2
Advocacy tools.....	3
Contacting elected officials.....	3
Leading a successful advocacy meeting with legislators.....	5
Recognizing advocacy efforts.....	5
Advocacy resources.....	6
Advocacy calendar.....	7

scsba.org



# Meeting management

## Professionalism

### Conduct professional meetings

- Conduct meetings in a businesslike manner, following parliamentary procedures.
- Consider both information and action items at board meetings and allow sufficient time for discussion.
- Insist that members are polite and treat each other, school personnel and the public with respect during board meetings.
- Begin meetings at the appointed time and end meetings at a reasonable time.

## Authority

### Parliamentary Guidance

Generally, all board have adopted the latest edition of *Robert's Rules of Order* to govern all matters not covered by the rules of the board.

## Leadership

### Board Chair

The board has elected the chair to facilitate the meetings, ensuring that they are conducted professionally and in accordance with the S.C. Freedom of Information Act (FOIA). As the presiding officer, the chairman will do the following:

- Call the meeting to order at the appointed time and close the meeting at a reasonable time.
- Announce the business to come before the board in its proper order.
- Enforce the board's policies relating to the order of business and the conduct of meetings.
- Recognize persons who desire to speak and protect the speaker who has the floor from disturbance or interference.
- Explain what the effect of a motion would be if it is not clear to every member.
- Restrict discussion to the question when a motion is before the board.
- Answer all parliamentary inquiries, referring questions of legality to the board attorney.
- Put motions to a vote, stating definitely and clearly the vote and result thereof.

# Freedom of Information Act (FOIA)

The South Carolina Freedom of Information Act (FOIA) ensures that public business is conducted in an open and public manner.

For school boards, FOIA applies to:

- Public meetings and closed meetings (executive sessions);
- Notice requirements for these meetings;
- The release of public records; and
- Any matter that involves public business or the spending of public funds.

The FOIA defines a **meeting** as a convening of a quorum either in person or by electronic equipment to discuss or act upon a matter over which the public body has supervision, control, jurisdiction or advisory power.

FOIA permits a board to go into a closed meeting (or executive session) for specific purposes such as receipt of legal advice, discussion of contract negotiations, discussion of settlement of legal claims and discussion of employment matters, although it does not require any closed sessions.

Boards cannot poll board members in executive session, or commit to a course of action during executive session. **The board must take votes in open session.**

Once the board goes into executive session, the information shared is confidential. Executive session discussion can include matters which might embarrass an employee or a student or lead to legal challenges. Public discussion of confidential employee or student matters can lead to charges of slander or invasion of personal privacy. Public discussion of legal matters can also jeopardize the district's position. For example, information can include the discussion of lawsuits against the district or of property the district may want to purchase for a

school site. Public discussion of land contracts might cost the taxpayer dearly.


Under FOIA, school boards must provide written public notice at the beginning of each calendar year, giving dates, times and locations for school board meetings. Agendas for these meetings must be posted at the office or meeting place at least 24 hours before the meeting. If a special called board meeting or emergency meeting occurs, notices must be posted.

School districts must post the meeting minutes, including the agenda, within 15 days of the next board meeting. Districts must also provide copies of school board meeting minutes whenever requested. These records should be readily available during regular business hours for the preceding six months.

School boards must comply with FOIA deadlines when responding to other informational requests or denying written requests to copy or inspect records. Only certain materials or records are exempt from disclosure, such as personal information where disclosure would constitute unreasonable invasion of property or documents related to proposed contractual arrangements or related to the sale or purchase of property (not exempt once contract is closed).

## FOIA

### FREEDOM OF INFORMATION ACT



SCSBA offers on-site training for boards and administrators on **current FOIA laws and best practices.**

**For more information, contact Rasheeda Cleveland**



# Other resources

**SCSBA helps schools boards and their members reach their highest potential through association programs, meetings and services.**



*Click image to download SCSBA brochure.*

## Awards

Each year, SCSBA honors board members, superintendents and community leaders who contribute to the success of their school districts. Visit the [SCSBA website](#) to learn more about our Legislative Advocacy Award, Champions for Public Education Award and Service Awards.

## Join SCSBA on social media

SCSBA's [Facebook](#) and [Twitter](#) pages are places where you can find timely education updates and information. They are also a forum for thoughtful discussion about education issues and ideas. Please 'like' and 'follow' our pages and spread the word to others who care about public schools. We will continue to provide SCSBA news, as well as links to interesting articles on trends in education, and we would love to have your comments and input!

## South Carolina School Boards Insurance Trust

The South Carolina School Boards Insurance Trust (SCSBIT) is one of the services provided by SCSBA. Providing workers' compensation and property and casualty insurance, along with risk control services, through a not-for-profit structure, has made SCSBIT the trusted insurance partner of South Carolina school districts. Currently insuring more than \$13 billion in school properties and serving 400,000 students and 80,000 employees, SCSBIT has, for more than 30 years, remained the largest insurer of school districts in the state.

At SCSBIT, the focus is on customer service to member school districts. Governed by a 14-member board of directors, SCSBIT is composed of 10 school board members appointed by SCSBA, two superintendents appointed by the South Carolina Association of School Administrators (SCASA) and two school business officials appointed by the South Carolina Association of School Business Officials (SCASBO).



*Click image to download SCSBIT flyer*

## SCSBA Mission Statement

**The mission** of SCSBA is to be the leading advocate for quality public education and equip school boards through training and services.



SCSBA



SCSBIT