



# What It Takes To Lead

## The role and function of California's school boards

This guide by the California School Boards Association provides answers to frequently asked questions about school board service. In particular, it may assist those:

- › seeking a better understanding of school board members' responsibilities;
- › seeking a better understanding of how public schools are overseen by school boards acting on behalf of the public;
- › considering whom to encourage to run for the school board;
- › considering whom to vote for in a school board election; or
- › considering whether to run for the school board themselves.

### Who are school board members?

School board members are locally elected public officials entrusted with governing public schools in the community. While school board members are elected as individuals, they serve as part of a governance team — one which includes each board member and the superintendent.

### Why do we have school boards?

Citizen oversight of local government is the cornerstone of democracy in the United States. It's the foundation that has lasted through the turbulent centuries since our nation came into being. In the book, *Time for Curriculum*, Henry Brickell and Regina Paul note that we use citizen control for "...cities, counties, states, regions, the nation. We use it for sewers, police, roads, rearing, rivers, libraries, airplanes, prisons, forests, the military – every government function; all staffed by experts, without exception; and all governed by civilians."

It's appropriate, then, that we entrust the governance of our schools to citizens elected by their communities to oversee both school districts and county offices of education. Today, nearly 100,000 citizens serve local communities throughout the nation as school board members, the largest category of elected public officials in the United States. School boards provide direction and oversight for the professionals who manage the day-to-day operations of the schools. They also provide accountability to the community.

### What's unique about California's schools?

In California, the public schools serve more than six million students — a collective student body larger than the total population of many other states. Over 5,000 school board members govern the nearly 1,000 school districts and county offices of education in our state. Ours is the largest public school system in the nation, with the most diverse student body. While approximately 40 percent of the state general fund goes to support PreK-14 public education California still lags most other states in per-pupil funding, spending almost \$2,000 less than the national average per pupil and ranking 41st in the nation when considering the cost of living and doing business in California. The state spends less of its overall economy (called effort) relative to the rest of the states.

California school districts vary widely, from isolated rural districts with fewer than 20 students to the largest urban district with over 700,000 students. There are "elementary districts" with grades kindergarten through 6 or 8, "high school districts" with grades 9 through 12 and "unified districts" with grades Pre-K through 12 — all overseen by local boards of education.

The school districts and county offices of education for which board members are responsible are multi-million dollar enterprises. Often they are the largest employer in a community, have the largest transportation and food service operations, and have the greatest number of facilities to maintain.

## Serving as a school board member

### What is the school board's role and what are its responsibilities?

It's easy to say that school boards "govern" their schools. But what does that mean in everyday practice? The role of the board is to be responsive to the values, beliefs and priorities of its community.

## ***A note regarding county boards of education***

Each of the 58 counties in California has a county office of education (COE) that provides valuable services and support to the districts and directly to students in their county. County boards of education and county superintendents are established as a shared governance model. Board responsibilities and the board–superintendent relationship differ between school districts and county offices. For example, the majority of county superintendents are elected, while some are appointed, whereas district superintendents are hired by the school board. Also, there are seven counties in the state that operate as both a county office and a school district. The laws that govern board meetings, however, are generally similar.

The board has five major governing responsibilities:

### **1. Setting the direction for public schools in the community**

Of all the responsibilities of governing boards, none is more central to the purpose of local governance than ensuring that a long-term vision is established for the school system. The vision reflects the consensus of the entire board, the superintendent and district staff, and the community as to what the students need in order to achieve their highest potential. The vision should set a clear direction for the school district/COE, driving every aspect of the district's/COE's program.

### **2. Establishing an effective and efficient structure**

The board is responsible for establishing and maintaining an organizational structure that supports the district's/COE's vision and empowers the professional staff. Although the board doesn't implement policies or programs, the board is responsible for:

- › employing the superintendent and setting policy for hiring other personnel\*;
- › overseeing the development and adoption of bylaws and policies;
- › setting a direction for and approving adoption of the curriculum;

- › establishing budget priorities\*, adopting the budget and Local Control and Accountability Plan, and overseeing facilities issues\*; and
- › providing direction for and adopting collective bargaining agreements\*.

### **3. Providing support**

Through its behavior and actions, the board has a responsibility to support the superintendent and staff as they implement the established vision. This involves:

- › acting with a professional demeanor that models the district's/COE's beliefs and vision;
- › making decisions and providing resources that support mutually agreed upon priorities and goals;
- › upholding district/COE bylaws and policies the board has approved;
- › ensuring a positive personnel climate exists\*; and
- › being knowledgeable enough about district/COE efforts to explain them to the public.

### **4. Ensuring accountability to the public**

The board represents the community and is accountable to the public for the performance of the schools in the community. The board establishes systems and processes to monitor results, evaluates the school system's progress toward accomplishing the district's vision and communicates that progress to the local community. In order to ensure personnel, program and fiscal accountability, the board is responsible for:

- › evaluating the superintendent and setting policy for the evaluation of other personnel\*;
- › monitoring, reviewing and revising policies;
- › serving as a judicial and appeals body;
- › monitoring student achievement and program effectiveness and requiring program changes as indicated;
- › monitoring and adjusting district finances\*;
- › monitoring the collective bargaining process\*; and
- › evaluating its own effectiveness through board self-evaluation.

### **5. Demonstrating community leadership**

As the only locally elected officials chosen solely to represent the interests of students, board members have

\* Area where county board responsibilities may differ from school board responsibilities.

a responsibility to speak out on behalf of children. Board members are advocates for students, the district's/COE's educational programs and public education. They build support within their communities and at the state and national levels.

The board has a responsibility to involve the community in appropriate, meaningful ways and to communicate clear information to the community about district/COE policies, educational programs, local condition and progress on goals. Governing boards must also ensure that the community and stakeholders have engaged in the LCAP development process. These five responsibilities are so fundamental to a school system's accountability to the public in our democratic society that they can only be performed by an elected governing body. Board members fulfill these roles by working together as a governance team with the superintendent to make decisions that will best serve all the students in the community.

### What makes an effective school board member?

How board members perform their role is as important as the role itself. Board members' relationships with each other, with the superintendent and other staff, and with the public have a profound impact on a board's effectiveness. These boardsmanship skills affect the board's ability to come to consensus about the direction of the school system, advocate with credibility, and establish a positive climate that encourages the best from staff.

While there is no ideal model of a board member, and while each serves with a unique style, background and perspective, there are some basic characteristics which effective board members have in common. Many of these qualities are acquired through experience and all are important to consider. Fundamental principles of effective governance are reflected in a series of Professional Governance Standards developed with input from board members and superintendents throughout California. Following adoption by the California School Boards Association's Delegate Assembly, the standards have been adopted locally by hundreds of district and county boards across the state. These standards recognize that to be an effective trustee, an individual board member:

- › keeps learning and achievement for all students as the primary focus;
- › values, supports and advocates for public education;

- › recognizes and respects differences of perspective and style on the board and among staff, students, parents and the community;
- › acts with dignity, and understands the implications of demeanor and behavior;
- › keeps confidential matters confidential;
- › participates in professional development and commits the time and energy necessary to be an informed and effective leader;
- › understands the distinctions between board and staff roles, and refrains from performing management functions that are the responsibility of the superintendent and staff; and
- › understands that authority rests with the board as a whole and not with individuals.

Furthermore, working with the superintendent as a "governance team," the board must have a unity of purpose and must:

- › keep the district/COE focused on learning and achievement for all students;
- › communicate a common vision;
- › operate openly, with trust and integrity;
- › govern in a dignified and professional manner, treating everyone with civility and respect;
- › govern within board-adopted bylaws, policies and procedures;
- › take collective responsibility for the board's performance;
- › periodically evaluate its own effectiveness; and
- › ensure opportunities for the diverse range of views in the community to inform board deliberations.

Finally, effective board members focus on closing opportunity gaps. Given persistent gaps that have denied opportunity to many students based on their economic status, race and other factors, board members that are focused on closing these gaps can help to ensure that public schools truly serve all students. Effective board members look at all decisions through an equity lens, meaning that they are focused on allocating resources to students based on their needs and constantly consider how board actions can help to close or widen access to opportunity.

It is vitally important that voters carefully choose the citizens to oversee their schools to whom they entrust their children and their tax dollars. It is equally important that school board

candidates understand the depth of commitment required to effectively fulfill the school board role.

For example, school districts and COEs are governed by boards, not by individual trustees. Understanding the collective decision-making process is an important step in becoming an effective board member. Optional Board Bylaw 9230, Orientation, provides guidance on how newly elected board members will be oriented to their role on the board.

## Becoming a school board member

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### How does someone become a school board member?

The vast majority of California school board members are locally elected. In only one case are county board members appointed by the county board of supervisors.

When a vacancy occurs on a board, the remaining members of the school board may order an election or appoint a board member to serve until the next regularly scheduled election in accordance with law. If the vacancy occurs within four months of the end of the board member's term, the board does not fill the vacancy.

### Who is eligible to serve on a school board?

School boards are nonpartisan. Candidates for boards are not required to belong to a political party. In California, you may be elected or appointed to a governing board of a school district if you are:

- › 18 years of age or older;
- › a citizen of the state;
- › a resident of the school district (or county for COE members)
- › a registered voter; and
- › not disqualified by the constitution or laws of the state from holding a civil office.

An employee of a school district may not be sworn into office as an elected or appointed member of that school district's governing board unless and until he or she resigns as an employee. If the employee does not resign, the employment automatically terminates upon being sworn into office.

Any registered voter is eligible to be a member of the county board of education except the county superintendent of schools, any member of his or her staff, or any employee of a school district that is within the jurisdiction of that county board.

### How many people serve on a school board?

While boards may consist of three, five or seven members, the majority of California school boards are composed of five members.

### How long are school board terms?

School board members serve for terms of four years. Terms are usually staggered so there will be openings every two years.

### When are elections held?

Most school board elections are held in conjunction with November general elections in even-numbered years. The best way to find out the date of the next election is to call the office of the superintendent of the local school district or county office of education.

### How are board members elected?

Board members are elected in one of three ways:

- › **At large:** Board members can live anywhere in the district and are elected by all the voters in the district.
- › **By trustee area:** Board members have specific geographic trustee areas in which they must live and are elected only by the residents of that area. It is important to note that all county board members are elected by trustee area.
- › **From trustee area:** Board members must live in particular geographic areas but are elected "at large" by all the voters in the district.

### How does someone become a candidate for school board?

Candidates must fill out a "declaration of candidacy" form. In most cases, this must be picked up and filed at the county elections office. In a few counties, it's possible to get forms at the local school district administration office or the county office of education. According to the state Elections Code, declaration of candidacy forms must be filed during a period extending from 113 days to 88 days before the election is to be held. For November elections, candidate filing takes place for several weeks during the summer.

Candidates should consult the county elections office to determine whether or not filing fees or nominating signatures are required. Occasionally a school district election is influenced by a city charter and filing procedures may vary somewhat.

There may be a fee if a candidate wishes to have a candidate statement printed in the voter's guide distributed to all local voters. Some school districts and county offices pay for the printing of this statement for all candidates to their board.

### Are there rules about school board campaigns?

School board campaigns range from simple to sophisticated, depending on the candidate and the community. One element all campaigns have in common, however, is the state requirement for reporting campaign finances. State law governs the reporting procedures to be followed. School board candidates who have over \$1,000 in expenditures or receive contributions totaling \$1,000 or more must report contributions and loans received, and expenditures and loan repayments, to the county elections office. School board campaigns range from simple to sophisticated, depending on the candidate and the community.

Once elected, school board members must abide by state requirements dealing with the filing of Statements of Economic Interest relating to conflict-of-interest regulations. These involve public disclosure of economic interests and require public officials, under certain circumstances, to disqualify themselves from making governmental decisions which could affect their financial interests. More information on this topic is available from the California Fair Political Practices Commission in Sacramento.

### Where is more information available about the election process?

The county elections office has complete information about the local elections process. The superintendent's office in the local school district or county office of education should be able to provide the name and phone number of the county government office that handles elections. In many counties, candidate handbooks are available. Additional information is available in California's Education Code, Government Code and Elections Code.

## Newly elected school board member resources

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The California School Boards Association offers a variety of resources and training specific to the needs of school board members.

### Professional development

[www.csba.org/TrainingAndEvents/GovernanceBasics](http://www.csba.org/TrainingAndEvents/GovernanceBasics)

**CSBA's Orientation for New Trustees at the Annual Education Conference** – This one-day, preconference orientation for new trustees prepares new board members for their first 100 days of service.

**Institute for New and First-Term Board Members** – This innovative two-day seminar is one of the best opportunities for newly elected and first-term trustees to learn about their unique role and responsibilities.

Professional development continues throughout your journey as a school board member. Visit [www.csba.org/TrainingAndEvents](http://www.csba.org/TrainingAndEvents) for a full list of all CSBA trainings.

### Publications

*Call to Order: A Blueprint for Great Board Meetings* – This comprehensive resource includes content regarding the structure and leadership for board meetings as well as parliamentary procedure.

*The Brown Act: School Boards and Open Meeting Laws* – This guide to the Brown Act is a must-have for any board member.

*The School Board Role in Creating the Conditions for Student Achievement: A Review of the Research* – This report synthesizes district improvement research and demonstrates how school boards can impact student outcomes.

To view all of CSBA's publications, visit [www.csba.org/CSBAStore](http://www.csba.org/CSBAStore).

The CSBA website provides a wealth of resources and information for all board members. Visit us at [www.csba.org](http://www.csba.org).



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