

New school directors:





Negotiating the learning curve



You've gone through board organization, perhaps attended a public board meeting, and you might be thinking, "What have I gotten myself into?"

If you are feeling this way as a newly elected school director, that's natural. The tasks before you are many, and you may not fully understand how to read a school budget, what the difference is between policy and regulations, or why you need to care about Act 1 of 2006. The scrutiny and accountability placed on today's school directors is much different and much greater than a generation ago.

Fortunately, school directors have many resources available to them both at the local level and through their association. This article provides some key information points that can help both new and veteran school directors navigate their roles and responsibilities.

General responsibilities

While many school directors may have experience in management, they may not have the same level of comfort with governance. There is a difference, and learning that difference is one of the main hurdles to overcome, said Brianna Crowley, PSBA Education and Training manager. A key is understanding that an elected board of nine members plays a strategic role and sets the broad vision of the district. The school administration oversees the day-to-day operation to make sure the board's vision is carried out.

Looking for information on the duties of school board officers?

Sections 426-433 of the Pennsylvania Public School Code contain this information. Read the School Code online at <http://www.legis.state.pa.us/WU01/LI/LI/US/HTM/1949/0/0014..HTM>.



school directors and the superintendent. By themselves, school directors have no authority. Only the full board can make decisions for the district. While not a voting member of the team, the superintendent is critical in the board's and the district's success.

"In order for this 10-person entity to survive and thrive, an atmosphere of mutual trust must exist," said Crowley. "This may take time, especially as new members are added to the team, so patience and hard work are needed."

Studies, such as the Iowa Lighthouse Study, have shown that the decisions made by an efficiently operating board directly and positively impact student achievement.

"Because of this, school directors should never take their work lightly," said Crowley. "It's easy to lose sight of student achievement when you are in the weeds discussing bus routes and budgets. The decisions you make today will have an impact on your students now and in the future."

Training is a critical component of a well-run board. PSBA offers a variety of training on dozens of topics, including a customized workshop on roles and responsibilities to help the Team of 10 work as an efficient and collaborative team.

In January 2018, PSBA launched newly revised online courses that school directors and administrators may take at their convenience (see sidebar on page 17). In addition, various live workshops are held across the state. The year of learning culminates with the annual PASA-PSBA School Leadership Conference, the joint conference of PSBA and the PA Association of School Administrators, further emphasizing the Team of 10.

Beginning in the 2018-19 school year, all newly elected or appointed school directors are required to complete during the first year of their first term a training program made available by

Newly elected school directors will start to hear the term "Team of 10." That team consists of the nine elected

the Pennsylvania Department of Education (PDE). The program must include at least four hours of content on instruction and academic programs, personnel, fiscal management, operations, governance, and ethics/open meetings. In addition, all re-elected school directors will be required to complete a two-hour advanced training program on relevant changes in state and federal law and regulations, fiscal management, and other information as determined by PDE.

Details are still being finalized on this new development included in Act 55 of 2017, the Pennsylvania School Code. This mandatory training should be viewed as a minimum. For school directors to fully grasp all that they need to know to be effective in their jobs, additional training is recommended. This is easy to accomplish with the wide variety of programming available through PSBA.

Budget and finance

In many parts of the state, the local school district is the community's largest employer with multimillion dollar budgets, making it the largest "industry" in the local economy. This can feel overwhelming to new school directors, but should not discourage them. Within a month of taking office, school directors will be making budget decisions for the upcoming school year. Unfortunately, many of these decisions are being made without knowing how much funding will be coming from the state.

Budgeting is a challenging exercise that requires careful balancing of sometimes conflicting objectives of reducing expenditures and controlling costs while providing for the educational needs of students.

In 2016, the state approved a Basic Education Funding Formula, which has greatly decreased the guessing game on what a district's state revenue will look like. By plugging in the state revenue, districts are able to more accurately gauge what their state revenue will be. However, the formula is only applied to new revenue from the state. Over time, all Basic Education Funding will be funneled through the formula.

Boards must think ahead as to what programs will be up for reduced funding or elimina-



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Very simply, listen carefully and read all the reports. Yes, that even means you should read entire policies and scroll down the monthly reports from the treasurer and others. Then, as needed, ask specific, educated questions of those folks who are tasked with managing as we direct for the best interests of all the children and families placed into our care. Remember, you are one on a team of 10!

Sue Dieffenbach

board member, Cornwall-Lebanon SD (Lebanon Co.)

Don't have an agenda. Attend as many meetings (regular, committee, special) as you possibly can. Support the administration and staff. Attend as many school functions as you can to show your support for the students. Be a good steward of taxpayer funds.

Albert Marazas

board treasurer, Minersville Area SD (Schuylkill SD)

Promoting and sustaining quality public education for all children is our most important collaborative goal; one our ancestors and predecessor lawmakers recognized – ignorance is costly. Each school director is one person, elected to serve, with ideas to be shared with other board members. Rather than a position of power, it is one of potential influence in a market of reasonable and feasible ideas to be fleshed out in dialogue, research, intelligent debate and decision-making for our children's future and their ability to make good decisions about their future, and the future of democracy.

Donna R. Gavitt

BLaST IU 17 board member, board treasurer, East Lycoming SD (Lycoming Co.)



Make promises to yourself, not others. Promise yourself you'll explore and expand your knowledge about the things you feel passionate about and what you want to get done. Also promise yourself what kind of board member you will be and how you will conduct yourself. Then commit to creating good policies and a good environment on the board to get those promises you made to yourself accomplished.

Matt Rivera, board vice president, Norristown Area SD (Montgomery Co.)

Remember, the superintendent works for you, not the other way around. If you don't have enough information, vote NO. Make sure you are getting the information you need in a timely fashion in order to make the informed vote. Take your concerns privately before making them public. Give people the benefit of the doubt.

Lois Kaneshiki

board member, Hollidaysburg Area SD (Blair Co.)

Remember all supporting documentation supports the recommendations. Don't assume anything, ask questions. The quality of the answers depends on the quality of the questions. Get ALL the information needed to make an informed decision. Vote no because you DO understand the issue and disagree. Vote no because you were not given the information timely. Issues that spring up at the last minute without having time to consider should be rare. Do NOT vote when being rushed.

Raeann Hofkin, CPP

board member, Upper Perkiomen SD (Montgomery Co.)

Learn, learn and keep on learning. If your district superintendent and board president do not already have an orientation scheduled, request a separate meeting with them to familiarize yourself with general info (board meeting schedules, administration job titles and reporting, board etiquette, protocol). Then take the time to meet one-on-one with the business manager, director of curriculum, director of community relations, etc., to get as much info as possible on day-to-day operations. Also try to educate yourself on the current educational hot topics (charter schools, fair funding for schools, state funding vs. state mandates, etc.), and request online newsletters from groups such as Education Voters PA. Check with PSBA for book recommendations on any other topics that your specific district might be facing (e.g., collective bargaining, building and technology security, community relations).

Lisa A. Roth

board vice president, Parkland SD (Lehigh Co.)

It is imperative that new school directors develop effective collaborative techniques in order to fulfill the mission and vision of their school district. Working together in a collegial manner with other board members and administrators is critically important. Asking questions, attending events, reading all documents, and regularly communicating with constituents will lead to a successful tenure as a school director!

Justin Shivone, board member, Interboro SD (Delaware Co.)



Budgeting is a challenging exercise that requires careful balancing of sometimes conflicting objectives of reducing expenditures and controlling costs while providing for the educational needs of students.

tion if revenues decrease. The district cannot, because of the Act 1 index limit, raise taxes above the index except for limited exceptions. Determining whether or not the board will be

willing to raise taxes – and under what circumstances – should be discussed before decision-making time. That way, when the decision needs to be made, it can be done in a timely fashion.

Many new school directors are surprised by how little control they have over a school district's bud-

get. Anywhere from 70-90% of a district's budget is already tied up with pensions, existing debt, salary and benefits costs, charter school tuition payments, and hundreds of other state mandates.

Legal obligations

School law is often a foreign and bizarre area for new school directors. With so many terms to learn and rules to follow, learning about school law can be overwhelming. A basic understanding of the legal authority of boards is a good starting point. Stuart Knade, PSBA senior director of Legal Services, said that although individual members have a voice in board proceedings, "The legal authority for the board to act is through the collective action of the board, and not the actions of an individual school director."

One important area for school directors to be familiar with is school employment law. School employees are public employees and as such, have both statutory and constitutional rights that differ from those working in the private sector, especially in terms of termination and tenure. For example, Knade said, tenured employees can only be furloughed for specific reasons under the Pennsylvania School Code. With the passage of Act 55 of 2017, schools for the first time are permitted to furlough professional staff for economic reasons. Because this authority is so

new, it has not yet been tested in practice. As a result, Knade says questions remain that may be resolved only through union legal challenges or other litigation.

School directors also should have some legal knowledge in the area of student discipline. Students have constitutional rights, and because the board is responsible for adopting policies that regulate student discipline, training is essential, Knade said. An example of boards' involvement in this area is decision-making regarding a student's expulsion due to disciplinary infraction.

No longer a private citizen, the role of a locally elected official holds personal legal implications for school board members. Therefore, new school directors need a basic orientation to potential conflicts of interest under statutes like the Pennsylvania Ethics Act as well as general liability concepts.

Knade recommends using the resources available to better understand this complex part of the job and avoid oversimplifying the law. Relying on the advice of the district's school solicitor or other legal counsel is crucial. He also suggests accessing PSBA's new online courses to learn legal basics: "By taking advantage of the training available, school directors can start learning the legal landscape and what questions they may want to ask their legal counsel."

Advocacy

When school directors ran for office, advocacy may not have been the first thing on their mind. However, as an elected school director, they are in a unique position that gives them both insight into public schools and a voice as an elected community representative. Legislators want to, and need to, hear their perspective on providing quality education for our children.

Advocacy can be intimidating to people. New school directors may think, "What if I don't know the issue well enough? What if they ask me questions I can't answer?" None of this should stop them from being an effective advocate. First, there is nothing wrong with telling a legislator or staff person that they don't know the answer, but will find out and get back to them. Second, one of PSBA's main goals is to keep school directors and



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administrators informed on the issues in Harrisburg through the website, weekly *Legislative Report* e-newsletter, and *Daily Edition* e-newsletter, not to mention various webinars throughout the year.

School directors can pick their comfort level when it comes to advocacy. On the PSBA website, members can access the Legislative Advocacy tab to take action on legislative advocacy, find legislators, search bills and many other sources of information. With a few mouse clicks, they can be contacting their legislators on important topics. If they want to get more involved, personal visits both to a legislators' district and Harrisburg offices can be a very effective strategy for making their voice heard.

In addition to methods of communication, school directors can introduce themselves to elected officials at public events, invite local legislators to events in their schools, and learn more about elected state officials and what committees they are on. After meeting with a legislator, members should let PSBA know how he or she responded to the issues.

Regular communication with legislators about how their decisions impact schoolchildren is key. Suggestions include writing letters to the editor and opinion editorials, and using social media to share news about districts and interact with legislators.

If school directors want to know more on proper advocacy, PSBA has a playlist of short advocacy tips on our YouTube channel at www.youtube.com/user/PSBAvideo.

PSBA: Your resource for support and training

With such a short amount of time between taking the oath of office and making decisions, it's important that newly elected school directors learn the information and skills they need. PSBA is here to help. PSBA's live New School Director Training (NSDT) has passed, but there are a number of ways to get the professional development needed. In January, PSBA launched a new online training program in three levels – introductory, advanced and board leadership. These online courses are fairly compact, allowing school directors and administrators to select the topics they need training on most (see sidebar on page 17 for more details).

There are other resources available for new school directors on the PSBA website. Access the Principles for Governance and Leadership, designed to help boards work together more effectively. PSBA's *Essentials of School Board Service: A guide to surviving your first year* will walk school directors through the basics in an easy-to-read Q&A format. The handbook also includes a glossary of common education terms and a list of acronyms that new school directors will find helpful. The printed version of the handbook was mailed to all school district superintendents for distribution to members, and the full document can be downloaded online. Simply search for "Essentials of School Board Service" or "Essentials of Parliamentary Procedure."

Although the learning curve is steep, school directors who take the steps to become informed and prepared can start public service with confidence. For more information on how PSBA can help, visit our website www.psba.org or contact us at (800) 932-0588. **B**

Always remember – you don't know what you don't know.

Cathy A. Shaffer

former board member, board vice president, York Suburban SD (York Co.)

Remember you are only one of nine and it does take time to mature in the position to better understand the history and culture of the district.

Jim Matarazzo

board member, Penn-Trafford SD (Westmoreland Co.)

I would highly recommend attending training sessions on what your role actually is while serving. Too many of us get too involved in the first year that we could easily be part of the administration and we forget or are not sure what our role is. This is the best example I can give, and I remember this from my training: as a board member it is not our role to decide how many meatballs should be in a meatball sub – that's for administration to decide. The day-to-day decisions should be dealt with by administration.

I would also highly recommend to school board members who have children in the district to keep everyone's child in mind when making a decision and not pay attention only to the grade level in which your child is for that year.

Also, make the decision that is best for the district to include taxpayers; treat that money as if it is your own budget and/or your pocket. If the district along with the budget belonged to each board member, the discussions to spend money would be totally different.

Anna Pascarella

board member, New Castle Area SD (Lawrence Co.)

Always pause and gather all the facts of any complaint brought to your attention. Remember, most complaints should be resolved by your administration, never addressed by individual board members. Trust your administration and let them do their job. Respect your fellow board members. You're all in this together, for better or worse. Disagree all you want, but at the end of the day, shake hands and move on.

Jennifer Tomon

board member, Ellwood City Area SD (Lawrence Co.)