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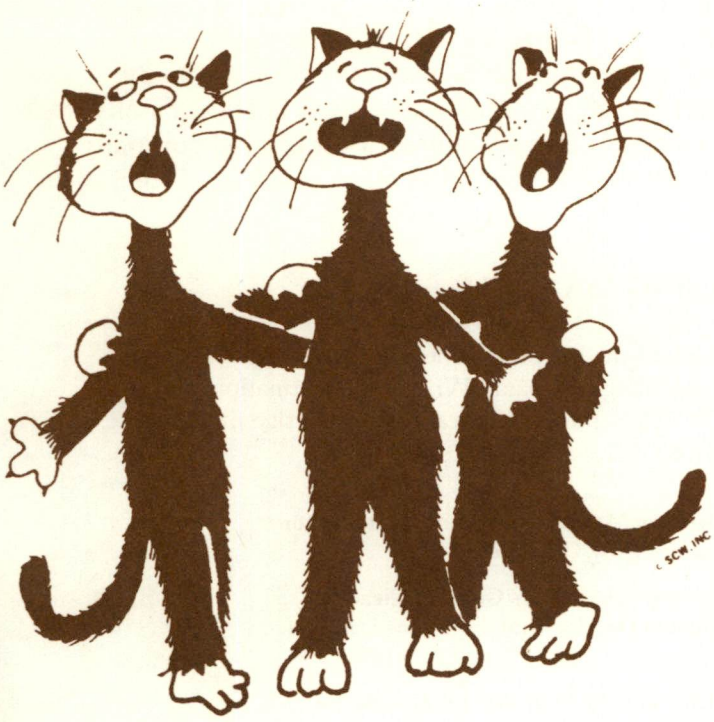


An Annotated Bibliography on Boards and Councils

by David Magnani and Newell McMurtry

Citizen Involvement Training Program
School of Education, University of Massachusetts

BREAKING THE BOARDOM



An Annotated Bibliography
On Boards and Councils

by David Magnani
and
Newell McMurtry

The Citizen Involvement Training Program is a resource of the School of Education, Division of Instructional Leadership at the University of Massachusetts

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OTHER CITP TRAINING MANUALS

There are eight other manuals in the CITP series. Single copies are $6.00 plus $1.25 postage and handling, prepaid. Write for information about quantity discounts: CITP, 225 School of Education, University of Massachusetts, Amherst, MA 01003, (413) 545-2038.

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The Citizen Involvement Training Program

The CITIZEN INVOLVEMENT TRAINING PROGRAM (CITP) helps citizens and citizen groups, nonprofits and government to become more effective through a variety of services:

—Consultation
—Technical Assistance
—Individualized training workshops
—8 nationally-recognized manuals

CITP provides to clients:
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—Cooperative Extension Service
—Community Colleges
—Senior Citizens
—Advocacy

CITIZEN INVOLVEMENT TRAINING PROGRAM
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About the CITP Manual Series

Because the participants are the most essential resource for citizen training, it is sensible to consider the possibility of citizen training without the presence of "professional" trainers. And because there are people in nearly every citizen group who are aware of the need for skill-building and consciousness-raising, people with the insight and leadership skills to promote citizen training programs, it seems perfectly feasible to promote a self-sufficient approach to training.

This manual, as well as others in the series, is intended to help citizen groups set up their own on-the-job training activities tailored to their individual needs, issues, learning styles and experiences. It is also hoped that these manuals will be used to help orient new members to an organization and will be an integral part of membership/staff development. In writing these guides we have used what we have learned through our experience with hundreds of citizen groups to help you ask yourselves questions which will tap both universal and unique citizen group problems.

Those citizen group members who have participated in CITP workshops (or some other training workshop) will be able to use the manuals as a back-home resource to continue personal skill-building or to share it with others. Activities and information described in the manuals, however, have also been geared to those who have never had personal contact with CITP or other training agencies.

Some organizations are reluctant to spend time on training activities, at least before the merits have been proven. The reluctance is appropriate; training can be a diversion from the real concerns of the group. But training activities can focus so directly on those "real concerns" that progress toward more long-range goals is made during the training; doing and learning can become almost indistinguishable.

If you are the one introducing training exercises to your group, first you might want to spend some time discussing these reluctances or individual learning preferences. Then again, you may want to let the proof of the pudding rest in the tasting.



GETTING THE MOST OUT OF THIS BIBLIOGRAPHY



Where Did It Come From?

We had been doing workshops for community groups on Boards and Councils for years, but when the American Association for Community and Junior Colleges asked us to travel from Massachusetts to Charleston, South Carolina to do a series of workshops, we knew we would be unable to do much in-depth follow-up. We then realized that we needed to select some good materials we might leave with the groups we worked with, and subsequently we developed a rough annotated bibliography.

When Carol Caparosa, Director of AACJC's Building Better Boards program saw it, she asked if we planned to publish it. We decided that the idea made sense, and went back to the literature to update and revise it. Carol provided us with good insight on the format and a good number of entries. The Building Better Boards program also helped with the initial printing and publishing costs. We hope the reader will inform us of any ommissions or needed corrections. If the demand is there, we hope to update it periodically with each new printing.

What Were the Sources Used?

In compiling this bibliography, we began with one by Nelly Hartogs and Joseph Weber in their book, Boards of Directors — A Study of Current Practices in Board Management and Board Operations in Voluntary Hospital, Health and Welfare Organizations. This only covers materials developed before 1970. We then searched the annotated bibliographies included in Resources in Education (ERIC) from 1970 to 1982. We then searched the Current Index to Journals in Education (ERIC), also from 1970 to 1982.

Finally, we searched the card catalogue at our own library at the University of Massachusetts. We reviewed annotations for those entries we had read ourselves and added any other items yielded by this last search. Having reviewed many of the annotations from ERIC or Hartogs and Weber for items we have read ourselves, we feel fairly comfortable with the annotations in general.



How is the Bibliography Organized and Why?

You will notice form the Table of Contents that there are five major sections with Section V, Topical Information, having seven subsections. Each Section or subsection is broken out into Books, Papers and Journal Articles and, finally, Pamphlets and Manuals.

Section I, Learning to Be a Board Member, addresses materials which are directed primarily at board members themselves, particularly those who are just joining a board.

Section II, Becoming a Better Board Member, again addresses board members themselves, but particularly those who have served for some time and are interested in improving their skills or perhaps taking more leadership within their board.

Section III, Training Resources for Board Trainers and Administrators, is intended both for board leaders and for staff who are responsible to boards and responsible for helping boards become more effective. The section is most relevant for board subcommittees for training, chairpersons, or those filling an Executive Director role.

Section IV, Board Development Theory, is intended for the same audience as Section III, but provides resources which can be used to improve one's theoretical background and understanding of why certain board dynamics occur. It is particularly useful for those who plan to design their own board training programs, or who are responsible for designing new boards or re-structuring existing ones.

Section V, Topical Information, is directed to both board members and to staff and addresses some of the most common challenges and sources of concern for boards. Effective meetings are of course the bread and butter of good board functioning. We have included a special section on the legal implications of boardmanship because it is one of the most common sources of fear for new board members, and one of the most common sources of confusion among both members and staff.

Since public relations and fundraising are so intimately linked and since they are crucial roles played by boards, we have included a special section for materials addressing them. Nominating/Board Recruitment was included because of the central importance this issue plays in making any board effective, and because it is so consistently raised with us as a problem for boards.

Since good relations and role clarity between the Chief Executive Officer of an organization and the board are often so difficult to achieve, and since they are so critical to organizational success, we have included

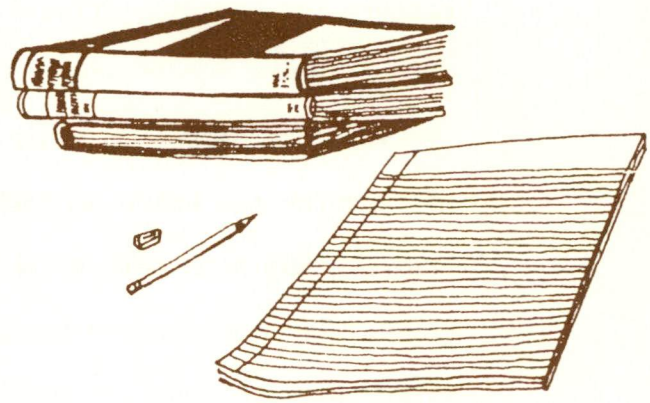
a special section to address this area.

The section on policy, goals, and evaluation is included to assist with special problems endemic to any organizational development effort, but with special reference to the role that boards play in these areas.

The bibliography closes with a section on Board-Employee Relations, an area which is often underemphasized during board training programs, but which is essential if the board is to carry out its function effectively. While there are often real concrete differences in the interest of the board and the interests of staff, these can often be either exacerbated or reduced depending on staff and board abilities for understanding each others' roles.

Within each section the entries are broken into three categories: Books, Paper and Journals, and Pamphlets and Manuals. The books include both academic studies and longer handbooks or "how-to" manuals. The papers and journal artices are typically more academic in tone and substance, usually allowing for a little more abstraction, and the pamphlets and manuals are much shorter in length and more practically oriented.

Using This Bibliography to Help Develop Your Board

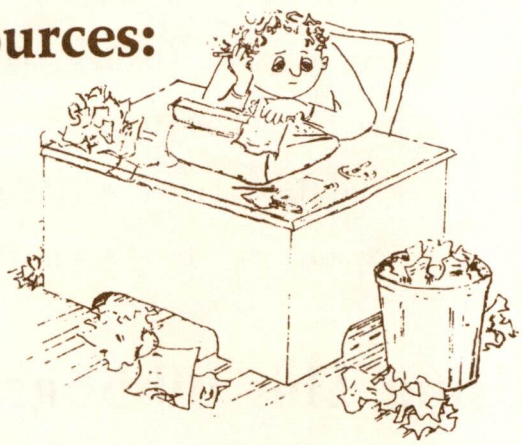


While this is only a bibliography and not a training manual, there are ways in which it can be used more effectively than others. First, we are assuming that in general most people interested in this bibliography are potentially people who might be in the role of "board trainer" at some point. Therefore, we would suggest that as a learning tool this bibliography be used in conjunction with the CITP Training of Trainers' manual, Beyond Ex-

perts. The general rule is that the sources used should match the settings and purposes for which it is being selected. When using a bibliography, especially an annotated one, there is often a tendency to want more of the written materials than are really needed or are really read by the board or by the trainers. The reason for the annotations and the comprehensiveness of this bibliography is not to allow the user to select a lot of materials, but quite the opposite. It should help to select the one or few best sources for a particular purpose.

Finally, actually reading through the bibliography itself as a "book" is an excellent and rather easy way to develop an overview of the various problems which boards face and the nature of some of the solutions which have been proposed for those problems.

Other Board Development Resources:



Sometimes reading a book or manual on how to build stronger boards or councils is not enough to make a real difference in the way a board functions. The assistance of a professional outside agency is needed, either to provide workshops or on-site training, technical assistance or intervention. Sometimes it is the specialized intervention skills that are needed, and sometimes it is the objectivity that a third party brings to a situation which is critical.

When this is the case, you may want to contact the Citizen Involvement Training Program directly, since we have done this type of work with boards and councils throughout the country for years. On the other hand, the

Building Better Boards program is designed to develop the skills of Community Colleges around the country to provide board development services at a more local level. You may want to contact your local community college or write directly to Building Better Boards, American Association of Community and Junior Colleges, One Dupont Circle, N.W., Suite 410, Washington, D.C. 20036 (202) 293-7050. In the meantime, we hope you find this bibliography to contain the type of information which will get you well on your way to solving your board problems on your own. Good luck!



LEARNING TO BE A BOARD MEMBER:

INTRODUCTORY MATERIALS FOR THE ORIENTATION OF A NEW BOARD MEMBER



A. Books

Allender, Donna Sclarow and Allender, Robert. I Am a Member of the Board, Volume 1 and 2. Big Brothers/Big Sisters of America Inc., Philadelphia, PA, 1982.

These books contain over 300 pages of models, guidelines and specific recommendations concerning topics such as fundraising, recruitment, public relations, planning, program, personnel and evaluation. The manual is educationally programmed for use by individuals or small groups such as committees. The program content encourages individual and small group investigation and problem solving.

Association of Governing Boards of Universities and Colleges. Financial Responsibilities of Governing Boards of Colleges and Universities. Association of Governing Boards of Universities and Colleges and National Association of College and University Business Officers, Washington, DC, 1979.

This material was developed by a joint steering committee and was field tested in eight colleges. It suggests how financial information should be presented to the governing board. Topics include: financial planning and management, generating financial resources; spending financial resources, protecting financial resources; and budgeting.

Boardsmanship. A Guide for California School Board Members. California School Boards Association, 916 23rd Street, Sacramento, CA 95816, 96 pp., 1979.

This manual is for new and current board members and describes school board activities in California. The first of 11 chapters discusses the board's function and the member's role on the board. Chapter 2 touches

on government regulation of education under federal and state constitutions and statutes. Chapter 3 introduces the structure of public education in California at the state, county, and local levels. The functions of school boards assocations at the state and national levels are covered in the fourth chapter. Chapter 5 discusses how board meetings are run and why they are run that way. Elements in the policy-making process are reviewed in Chapter 6. Chapter 7 explores the relationship of the board to the superintendent, while the eighth chapter clarifies the board's relationship to the rest of the school district's employees. In the ninth chapter the board's role in planning, implementing, and evaluating the district's instructional program is considered. Chapter 10 examines the history of school finance and outlines the preparation of the district budget. Chapter 11 explains how to cope with the financial demands of educational facilities. Glossaries of terms in employment relations and school finance are appended.

Connors, Tracey Daniel. The Non-Profit Organization Handbook. McGraw Hill, New York, NY, 1980. (see pg. 34)

Murdock, Ohn J., and Meyers, John F. Boards of Education: A Primer. Publication Sales, National Catholic Educational Association, One Dupont Circle, Suite 350, Washington, DC 20036, 81 pp., 1972.

According to these authors, the Catholic board of education is the church's structural response to the need for the community to be broadly represented in educational policy decisions. This book of readings is intended to be an in-service tool for board members. Chapters concern the areas of board of education role, the organization of the Catholic educational system, board meeting procedures, board's relationships with principals and pastors, and goals for the Catholic school.

National School Boards Association. Becoming a Better Board Member. National School Boards Association. Washington, DC, 1982.

This book provides practical advice on becoming a more effective board member. It is especially useful for the new board member. Topic areas covered include: general boardsmanship, leadership, decision making, boards and superintendents, collective bargaining, school finance, etc.

Pierson, H.L. Shaping the Schools: A Guide to Boardmanship. Revised. New Hampshire School Boards Association, 6 Garrison Avenue, Durham, NH 03824, 145 pp., March 1973.

An effective school board is well aware of its legal status as a corporate body. It understands its duty to deliberate and reach decisions regarding the educational needs of the community, the best use of available resources, the adoption of policies and programs which will secure an opportunity of great personal advantage to the youth of the community and, at the same time, protect the state from the consequences of an ignorant and incompetent citizenry. Frequently, school board members, either by choice or because of failure to be re-elected, have a relatively short stay in office. This high rate of "turnover" thrusts great responsibilities on those who may not always see clearly the consequences of some important decision. This handbook is designed to ease the transitional period by highlighting what a new school board member in New Hampshire needs to know. Described are needed skills in negotiations, decisionmaking, goal-setting, needs assessment, communications, and community relations. Experienced committeemen should also find the information useful for those new and unexpected problems that constantly arise.

Sorenson, Ray. How to be a Board of Committee Member. Association Press, New York, NY, 1961.

Short concise, easy to read, well organized. This book covers basics on: types of boards, their functions, methods of operation, and organization. A good general basic book on being a board member. A condensation of the author's book, The Art of Board Membership.

Swanson, Andrew. The Determinative Team: A Handbook for Board Members of Volunteer Organizations. Exposition Press, Hicksville, NY, 1978.

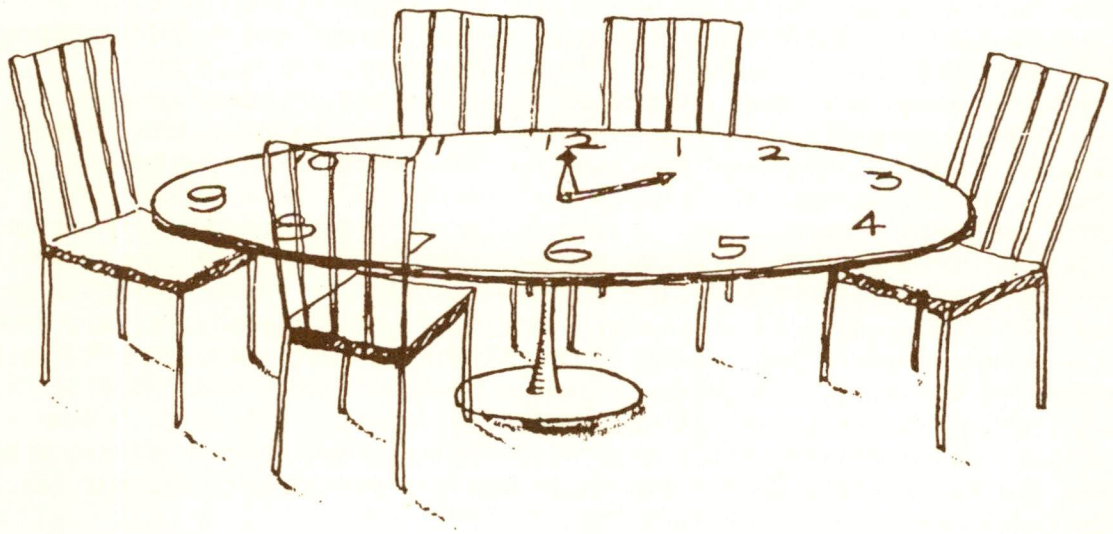
This book is based on the concept that the determination of policy is the responsibility of the volunteer leadership within community organizations. Case studies describing typical problems in community service organizations are provided as well as general information on committees, meetings, and the leadership development cycle.

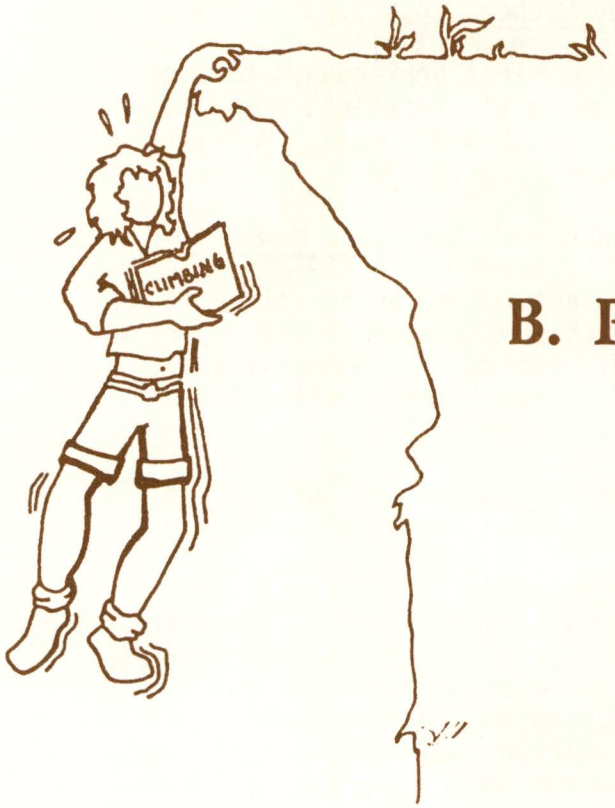
_____. The President and the Board of Directors and The Chairperson and the Advisory Council. Community Services Consultants, Ltd., Providence, RI, 1982.

These books provide the board president and the advisory council chairperson with all the basic information they will need to guide the Board of Directors and Advisory Council through each month of a typical agency year. Twelve monthly sections, one for each month of the year, include such topics as: Techniques for Making the Best Committee Choices; New Board or Council Member Orientation; Board of Council Self-Appraisal; Leadership Development and the Nominating Process; Budget Development; and Monthly Reminders about Essential Routines.

Handbook for Texas School Board Members. Texas Association of School Boards, Austin, TX, 83 pp., 1975.

This handbook is intended to provide school board members with a good basic understanding of the school board's duties and functions and its relationship to the community, the school administration, and the school staff. Chapters 1-4 focus in turn on the topics of school board organization and operation, school board-superintendent relationships, major functions of school boards, and school board-staff relations. The appendix provides a simplified guide to Texas school law, outlines responsibilities of the school board and the superintendent, lists sources of information and aid for Texas school board members, and presents a checklist for evaluating school board-superintendent cooperation.



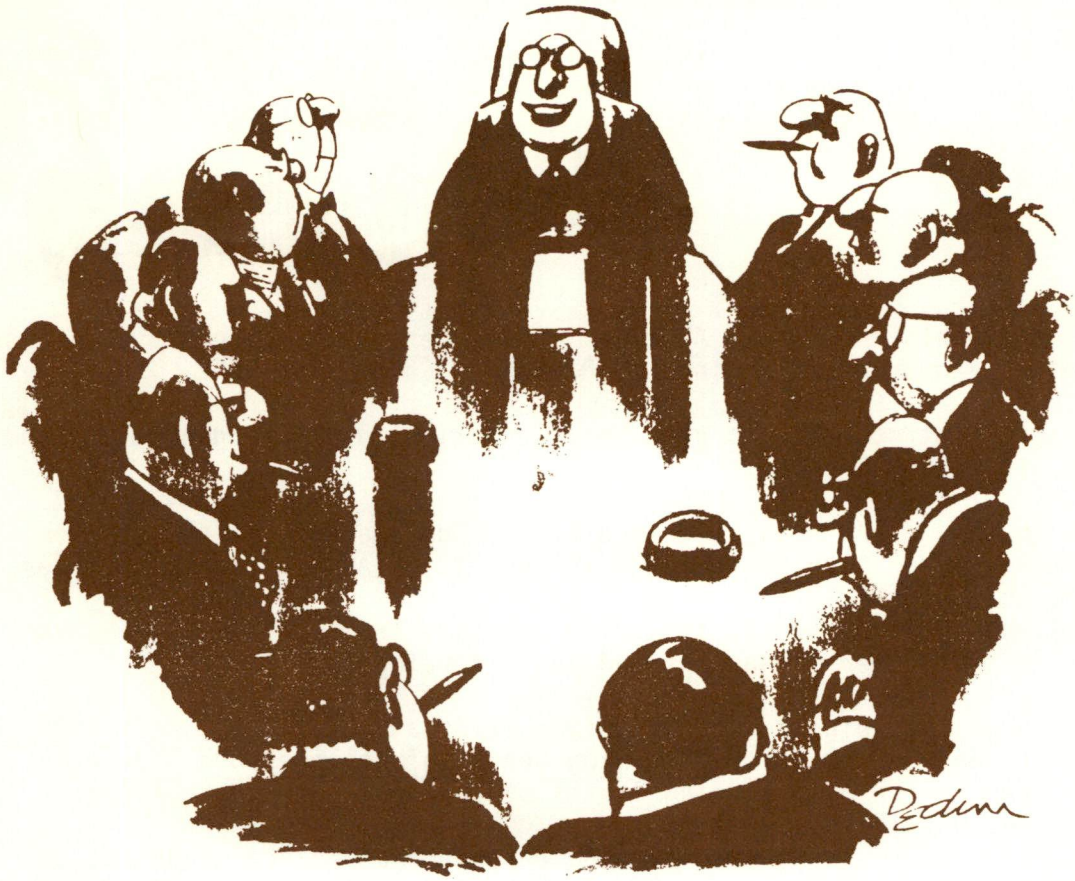


B. Papers and Journal Articles

Young Men's Christian Association. Braithwaite Burke, Yvonne. "Y Decisions--Do They Have Age? Sex?" New YMCA Today. Vol. 49 (Spring 1973).
Part of this issue of New YMCA Today is devoted to the new trend toward representative YMCA boards. There are arguments pro and con, as well as case histories by board and staff members.

Mathiasen, Karl, III. "The Board of Directors of Nonprofit Organizations." The Alban Institute, Wisconsin Avenue & Woodly Road N.W., Washington, DC 20016, 1976.
This is a very good 16-page paper on the overall functions of boards. It will help the reader see the general purpose and scope of boards, and is one of the best papers for this purpose.

O'Reilly, Robert C. "Some Expectations for New School Board Members." Paper presented at the Annual Meeting of the National School Boards Association (41st, Dallas, TX, April 11-14, 1981), 9 pp., April 1981.
Members of local boards of education should expect to spend around twenty hours a month on normal board activities, including about nine hours in meetings, four hours preparing for meetings, four hours in reflective thinking, and three hours dealing directly with schools and school patrons. Among topics that must be addressed carefully and regularly at meetings are the board's basic commitments or goals, its operations, its relations with the superintendent, the state of the facilities, relations with the faculty and staff, fiscal matters, the instructional program, non-instructional services, relations with the community, and student affairs. Finally, board members must assess their own performances and their interrelationships with other board members objectively in order to develop their own abilities and improve board effectiveness. This document presents these aspects of board members' activities and obligations in chart form.



"All the powers that be being present and accounted for, let us begin."

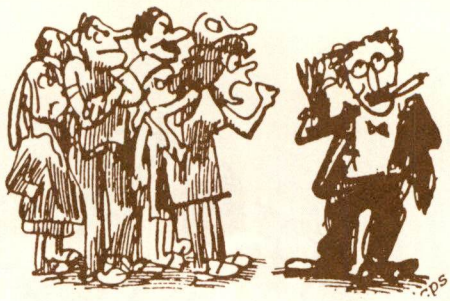
Drawing by Dedini; © 1974
The New Yorker Magazine, Inc.

C. Pamphlets and Manuals

Allender, Donna Sclarow and Allender, Robert. Board Member Orientation. Big Brothers/Big Sisters of America, Inc., Philadelphia, PA, 1982.
This manual provides an agenda and outline for conducting a board orientation program. Sections of the manual deal specifically with the Big Brothers/Big Sisters of America, Inc.; however, general information is provided in the areas of board member responsibilities, liabilities of board members, rights of board members, and board member job descriptions.

_____. I am a Member of the Board. Big Brothers/Big Sisters of America, 1979.
This is a three-ring binder for the development of board members of the Big Brothers/Big Sisters of America. It has some good areas that might be applicable to other boards in board organization, finances, public relations, and planning.

_____. Leadership Guide for Officers and Executive Directors. Big Brothers/Big Sisters of America, Inc., Philadelphia, PA, 1982.
This manual identifies various leadership styles and areas of board responsibilities such as structuring a committee, running meetings, minute-taking and -reporting, nominating process, duties of officers, board development and orientation, and evaluation. Activities that can be conducted with actual committees or entire boards are provided for each area.



American National Red Cross. A Guide for Chapter Board Members. Red Cross National Headquarters, Washington, DC 20006, Cat. No. ARC562, 15 pp., 1969.

A general introduction to good board practice and the organization and work of the Red Cross.

American Society of Association Executives. Fundamentals of Association Management: The Volunteer. American Society of Association Executives, Washington, DC, 1982.

A collection of materials including reprints from "Association Management" on volunteer management and board development.

Association of Governing Boards of Universities and Colleges. Self-Study Guidelines and Criteria for Governing Boards of Colleges and Universities. Association of Governing Boards of Universities and Colleges, Washington, DC, 1976.

The criteria and guidelines are the result of a project sponsored by the Association of Governing Boards of Universities and Colleges and conducted by the Center for Research and Development in Higher Education, University of California, Berkeley. The material suggests how to conduct a self-study organized around a set of criteria. The criteria include institutional mission and educational policy; institutional planning; physical plant; financial support and management; board membership and organization, and court of appeals.

Axelrod, Nancy R. A Guide for New Trustees. Association of Governing Boards of Universities and Colleges, One Dupont Circle, Washington, DC 20036, 15 pp., 1977.

Guidelines are given for new governing board trustees to prepare themselves for their responsibilities. Briefly outlined are the trustee's 10 major responsibilities: selection, nurture, and termination of the president; financial support and management; maintenance and expansion of the physical plant; public relations; clarification of purpose; assessment of performance; bridging the gap between community and campus; preservation of institutional independence; court of final appeal; and self-evaluation. These issues and elements of governance are briefly discussed: learning during the first year; background of higher education, and keeping up with current issues; knowing the institution; the issue of policy and administrative roles; delegating authority; faculty and student relations; and assessing one's own performance. A checklist is given for the latter. Suggested reading materials are listed.

Advisory Committee Handbook. Bergen Community College, Paramus, NJ, 46 pp.

This booklet was prepared to acquaint the personnel of the Bergen County public schools, the lay public and advisory board members with the purpose and functions of advisory committees serving the vocational, technical and adult education divisions of Bergen Community College. Following brief summaries of college history and philosophy, curriculum offerings, and the role of the Board of Trustees, the document reviews the organization and functions of advisory committees and provides detailed guidelines for committee operations in such areas as 1) qualifi-

cations, procedures for appointment, terms of membership, number of meetings, use of consultants, conduct of occupational surveys, provision of public information, and the responsibilities of the college representative; 2) bylaws for advisory committee operation; 3) evaluating and rewarding advisory committees; and 4) advisory committees and legislation. A checklist for getting the most out of advisory committees and a bibliography is included. Appendices contain various forms and correspondence relating to advisory committee and college interaction.

Board of Education Handbook. Planning for Lutheran Elementary Schools. E03. Board of Parish Education, The Lutheran Church-Missouri Synod, 3558 South Jefferson Avenue, St. Louis, MO 63118, 45 pp., 1978.
Part of a 13-volume series designed to help Lutheran communities assess the feasibility of starting a Lutheran elementary school and to assist ongoing schools in current operation, this volume is intended to help Lutheran boards of education clarify their role and make policy. The first part of the document deals with role, function and organization of Lutheran boards of education. Following an introduction, the second section looks at and defines several duties for the board of education, including roles in leadership, problem-solving, decision-making, and administering. Section 3 looks at three functions of the board's education policy-making, supervision, and management. Section 4 deals with organization of the board, including criteria for membership, size, offices, length of term, committees, and other factors. Section 5 outlines suggestions for conducting effective board meetings. The second half of the document concentrates on how to establish a Lutheran board of education policy manual and presents a sample table of contents for such a manual.

Boys' Clubs of America. Board Members Handbook, National Field Services, Boys' Clubs of America, 771 1st Avenue, New York, NY 10017, 32 pp., 1968.
Bibliography, checklist for evaluating a board of directors, suggested calendar of board events. A brief introduction for new board members, including: board--functions, criteria of selection, orientation; officers--duties; committees--functions; meetings--planning, agenda, conduct; relations--board and executives, board and staff, board and United Fund, board and council of agencies, and board and community.

Family Service Association of America. Board Manual, Family Service Association of America, 44 East 23rd Street, New York, NY 10010.
Relevant sections give a brief introduction to the board and its committees.

Fessler, Donald R. Community Leader Training. Community Leader Training Associates, Inc., Blacksburg, VA, 1971.
A series of six pamphlets designed to assist leaders in training citizens to work effectively towards chosen goals. The guides include the following: 1) neighborhood-community organization, 2) meetings that get results, 3) motivating the disadvantaged, 4) leadership and the effective group, 5) community problem-solving, and 6) how to be a leader.

Gifford, Peggy. What Is A Board? A Board Development Handbook. Voluntary Action Center, Toledo, OH (no date given).
Basic information on board roles and responsibilities.

Girl Scouts of America. A Board's Eye View of Planning. Girl Scouts of America, 830 3rd Avenue, New York, NY 10022, Cat. No. 19-939.
A very simple, schematic outline of board management.

Girls' Clubs of America. Handbook for Organization and Administration of Girls' Clubs, Girls' Clubs of America, Inc., 133 East 62nd Street, New York, NY 10021, 24 pp., 1969.
A brief administration manual for Girls' Clubs with a section on board, committee and board officers.

The Grantsmanship Center. Survival Package. The Grantsmanship Center, Los Angeles, CA, 1981.
A collection of publications written specifically for non-profit organizations. Topics include program planning and proposal writing, fundraising, marketing, and program evaluation.

Handbook for Members. Vocational Education Advisory Committee. Indiana Advisory Council on Vocational Education, Indianapolis, 18 pp., October 1978.

A handbook containing information and suggestions is presented to assist persons in fulfilling their vocational education advisory committee role. The introduction welcomes members and stresses the opportunity, responsibility, challenge, awareness, and service inherent in acceptance of the committee role. Various questions about the position are asked and answered in the handbook. The questions focus on the following topics: 1) the advisory committee definition, 2) various types of vocational education advisory committees (for example, general, program or special), 3) the helping role, 4) the state of Indiana mandates or responsibilities, 5) typical committee organization and function, 6) a suggested year program outline, 7) responsibilities of the vocational education representative to the committee, and 8) ways the state advisory council on vocational education can provide assistance. In addition, the handbook includes a self-check sheet for advisory committee members. The appendices contain relevant definitions and a five-part (purposes and name, membership, meetings, offices and duties, and amendments) suggested advisory committee constitution.

Hanson, Pauline and Marmaduke, Carolyn. The Board Member--Decision Maker. Han/Mar Publications, P.O. Box 60143, Sacramento, CA 95860, 40 pp., 1972.
A basic pamphlet providing a detailed checklist of the activities a new board member might want to be familiar with.

Krambeck, Gail. People Power -- A Guide to Good Board Membership. The Volunteer Bureau of United Way of Greater Des Moines.
A very brief pamphlet on a few general guidelines for new board members.

Lindsay, Margot C. Your Advisory Board and You: Some Guides for Administrators and Board Members. The Center for Public Service, Brandeis University, Waltham, MA (no date given).
This manual is written for advisory board members and administrators. The material is organized into guides which may be used either collectively or singly. The guides are designed to serve as an introduction to the various facets of board work, and as a reference for boards undertaking specific activities. Topics include: advisory board procedures; orientation for administrators, board members, and chairpersons; and the community/agency connection.

National Academy for Voluntarism. Volunteer Leadership Development Program. National Academy for Voluntarism, United Way of America, Alexandria, VA, 1980.
A series of eight training modules designed to effect citizen board improvement in voluntary organizations. The topics include Organizing and Governing the Agency, Board/Staff Relations, Financial Management, Organizational Performance Assessment, Decision-Making/Problem-Solving, Resource Development, Your Agency and the Community, The Crucial Relationship, and Planning and Goal-Setting.

National Council on Alcoholism. The Board of Directors and Its Committees at Work, 10 pp.
A short introduction to the board, its purpose, functioning, organization, committees, and membership qualifications.

National Council of Jewish Women. President's Handbook. National Council of Jewish Women, 1 West 47th Street, New York, NY 10036.
An analysis from the board president's point of view of the board, its committees and officers, as well as of the organization and the membership of the National Council of Jewish Women. A practical, short guide.

National Federation of Settlement and Neighborhood Centers. The Board of Directors of a Neighborhood Center. National Federation of Settlements and Neighborhood Centers, 232 Madison Avenue, New York, NY 10016, Order #910-68-13, 22 pp., 1968.
Brief and general introductory material on board structure and functioning, including new member qualifications and orientation, terms of office, election of officers and the work of each committee of the board.

_____. Day, Elizabeth. Responsibility for Community Change: New Faces and New Hats for Boards of Directors: A Study Outline. 18 pp.
The possible role of the board in the community with special reference to model cities; a compilation of resource materials including a discussion of the board as partner, advocate, and technical advisor.

National Information Bureau, Inc. The Volunteer Board Member in Philanthropy: Source of his Responsibilities, Achievements and Special Problems. National Information Bureau, Inc., 305 East 45th Street, New York, NY, 24 pp., 1968.
Do's and Don't's for a good board; self-evaluation for board members; evaluation of the agency by the board.



National Tuberculosis and Respiratory Disease Association. Managing Your Association: Handbook for Board and Staff. New York, 33 pp., 1969.
A practical introduction to the basic facts concerning boards, board membership and administration.

Parkman, Francis and Springer, E. Laurence. The Independent School Trustee Handbook (3rd ed.). National Association of Independent Schools, 4 Liberty Square, Boston, MA 02109, 66 pp., September 1974.
This handbook takes an up-to-date look at the complex issues of trusteeship and school governance. Although addressed to trustees of independent schools, it contains valuable insights and suggestions for all who serve on boards, in and out of education. The main topics covered are Governing Boards, The Board and the Head of the School, and Selecting a New Head and Getting Him Started. Material new to this edition includes comments on the nature of trusteeship, orientation of new trustees, evaluation of the school and of the head's performance, and contractual relationships with the head.

Rocky Mountain Planned Parenthood. On Being Board, or How Not to Be Dead Wood. Rocky Mountain Planned Parenthood, 2030 East 20th Avenue, Denver, CO 80205, 1973.
Short, straight-talking, opinionated handbook for prospective members of boards of Planned Parenthood affiliates.

SEDFRE. How to be an Effective Board Member. SEDFRE, 1 Penn Plaza, New York, Ny 10001.
Simple 22-page brochure covering the main points of board membership.

Simon, Toby R. Basic Boardsmanship. New Jersey School Boards Association, 315 W. State Street, P.O. Box 909, Trenton, NJ 08605, 72 pp., October 1979.
The intention of this manual is to inform school board members of the duties and responsibilities incurred with their election or appointment to a board of education. Specific reference is made to New Jersey; however, the general admonitions are applicable to board members from other states. Information and guidelines deal with the structure of the local board, board meetings, and the organization of the New Jersey School Boards Association. Responsibilities and limitations of board members are discussed in chapters that concern the board and staff, the curriculum, student rights, budgets, buildings and maintenance, labor relations, and public relations.

Swanson, Andrew. Evaluation: Bane? or Boon? Community Services Consultants, Ltd., Providence, RI, 1980.
This monograph provides a logical step-by-step process for the board to follow in its evaluation of the executive director. The basic evaluation process described is the process recommended by Planned Parenthood Federation of America, Inc., for use by its local chapters around the country.

So, You're a Board Member. Virginia Tuberculosis and Respiratory Disease Association, 16 pp.
A question-and-answer booklet for board members who want to test their own and the board's effectiveness.

Voluntary Action Center of San Gabriel Valley. So . . . You Serve on a Board. Voluntary Action Center of San Gabriel Valley, P.O. Box 5282, Pasadena, CA 91107, 24 pp., Revised 1978.

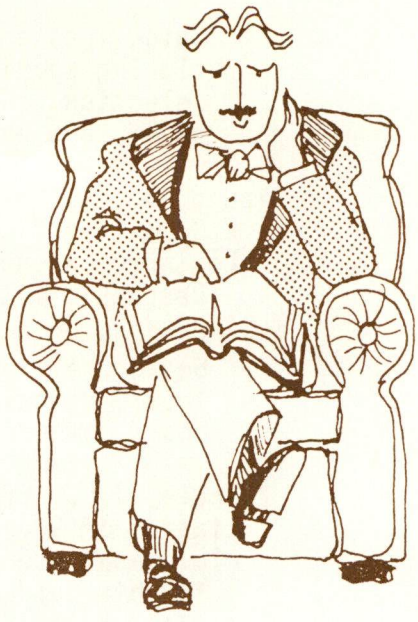
Guidelines on how to be an efficient and effective board member, including sections on functions of the board, the job of a board member, selection of new board members, term of office, training, board and staff, and evaluation checklists.

Young Women's Christian Association. The Role of the Board of Directors in a Community YWCA. Bureau of Communications, National Board, YWCA, 600 Lexington Avenue, New York, NY 10022, 28 pp., 1966.
Responsibilities of the board with respect to policy, membership, leadership, program, and the details of administration; composition of the board; relationships of the board with other administrative units on local, district and national level; board-staff relations; training of board members.

Zwingle, J.L. Effective Trusteeship. Guidelines for Board Members. Association of Governing Boards of Universities and Colleges, One Dupont Circle, Washington, DC 20036, 42 pp., December 1979.
In this guide trustees and regents are given a description of the special nature of the task of trusteeship, as well as a convenient guide to critical areas of trustee responsibility. Discussion begins with the problems of academic trusteeship: differences in expectations among interested parties-faculty, students, donors, legislators, public officials, parents, alumni, and the press. These issues in governance are outlined: the college as a corporation, the special nature of the academy, policy-making versus administrative functions, the role of the governing board, evaluating trustee performance, attitudes and expectations confronting trustees, pitfalls in trusteeship, and the nature of the trust. Details of the board's operation are discussed: its organization, the need for audits of both financial and overall health of the institution, bylaws, the board meeting, the agenda, responsibilities between meetings, relationships with the college president, presidential evaluation, relationships with faculty and students, faculty and student membership on the board, and relationships with the public. The future of trusteeship is briefly discussed and suggestions are given for bylaws, self-evaluation of boards and board members, and further reading.



2 BECOMING A BETTER BOARD MEMBER:



DETAILED MANUALS FOR ADVANCED STUDY

A. Books

Camp Fire Girls, Inc. Council Administration. Camp Fire Girls, Inc., 1740 Broadway, New York, NY 10019, Cat. No. 3-324, 57 pp., 1970.

A clear and informative book. It establishes the responsibilities of and standards for the board and its committees and details board jobs from decision-making to record-keeping. The appendix contains suggestions for writing by-laws, and director's manual and a discussion of insurance.

I The Local Council: Definition, legal and hortatory.

II The Board of Directors: Responsibilities; Standards; Committees; Functions: Administrative Volunteer Selection, Analysis and Evaluation, Camping, Community Relations, Finances, Group Maintenance and Extension, Personnel, Program Services, Volunteer Development.

III The Council Structure: Analysis of possible Council Structures (with charts) for the use of councils of various sizes and different stages of development. Methods for self-analysis of council structure.

IV Ways of Work: Job of the Board Member; Job of the Committee Chairman; Board Officers; Volunteers; Planning; Decision-Making; Accountability; Records; Business Management.

V. Professional Staff in a Local Council: Partnership; Board and Executive; President and Executive; Key Volunteers and Staff; Executive's Functions; Expectations of Volunteers and Staff.
VI. Appendix: Suggestions for board manual, keeping minutes, insurance, and writing of by-laws.

Conrad, William R. and Glenn, William E. The Effective Voluntary Board of Directories--What It Is and How It Works. The Swallow Press, 811 W. Junior Terrace, Chicago, IL 60613, 1976.
This new work shows a good deal of research and thought. While the printing leaves something to be desired, the narrative is well-written. The book describes in some detail and with considerable intelligence the dynamics of boards of directors of non-profit organizations.

Doering, Vivian N. Boardsmanship. A Guide to the School Board Member. California School Board Association, 800-9th Street, Sacramento, CA 95814, 133 pp., 1975.
To become a capable and successful board member, an individual must be willing to devote many hours to serving as a school trustee -- attending board meetings, school functions, conferences and workshops, and thoroughly studying issues and problems demanding decisions. This manual gives a comprehensive account of these areas of board responsibility and the specific "how to's" of procedure. This issue, which incorporates the significant points of the previous editions, has been aimed at updating information of importance to board members as well as at clarifying the role of today's board member. It is hoped that this manual will give the new board member a mini-course in California public school boardsmanship and will refresh and update the knowledge of board members who have already served for a period of time.

Harper, Mary-Angela. Ascent to Excellence in Catholic Education: A Guide to Effective Decision-Making. Publications Sales, National Catholic Educational Association, One Dupont Circle, Suite 350, Washington, D.C. 20036, 278 pp., 1980.
Before 1960, the Catholic laity had virtually no say in the governance of Catholic schools. All decisions were made and handed down by bishops, pastors, and provincial superiors of religious orders. Now most dioceses and perhaps half the parishes in the country have a board or committee that shapes significantly in decision-making about such matters as salaries and fringe benefits; tuition and fees; budgets; planning; overall evaluation of programs and personnel; policy-making; and the opening, closing or consolidation of schools. This volume is a reference work offering specific guidance on a board's duties and opportunities. Discussed are a board's responsibilities in regard to planning, evaluation and finance; and the relationships of board members with faculty, students and the public. The appendices contain numerous models of various board functions.

Houle, Cyril O. The Effective Board. Association Press, 291 Broadway, New York, NY 10007, 1960.
Drawn from Professor Houle's annual board member training institute conducted in Chicago in the 1950's and 60's. Thoughtful, solid, readable, it discusses the operations of a board and gives many clear guidelines on how a board may function better. It is written in the style of a step-by-step guide.

King, Clarence. Your Committee in Community Action. Harper and Brothers, New York, NY, 114 pp., 1952.
The chief feature of this book is its readability; it covers all the usual points involved in good board management, illustrating them vividly with examples from the author's experience.

National Association for Retarded Children. The Local Association for Retarded Children. National Association for Retarded Children, 2709 Avenue E East, Arlington, TX 76011, 224 pp., 1965.
Introduction to the structure and functioning of the local unit with long sections on the board, its committees, proper board procedures, the position of the executive, administration, and finances.

Planned Parenthood Federation of America. Outline for the Affiliate Handbook: A Collection of Papers. Planned Parenthood--World Population, 575 Madison Avenue, New York, NY 10022, 181 pp., 1971.

A collection of mimeographed guidelines and articles has been organized into a manual for affiliates. A large section of the book is devoted to the program of Planned Parenthood, but the three chapters on personnel and the section on committees are of general interest.

Rodgers, Joseph Lee, Jr. Citizen Committees: A Guide to Their Use in Local Government. Ballinger Publishing Company, 17 Dunster Street, Harvard Square, Cambridge, MA 02138, 103 pp., 1977.
This guide was prepared to fill the need for literature on the formation and functions of citizen committees. It is designed for mayors, other public officials, and citizen leaders who are responsible for creating committees and for citizens who serve on committees. Types of citizen committees are defined and classified according to primary functions. The benefits and detriments related to the use of citizen committees are identified, and specific principles for creating committees are presented with explanations. Sixteen different types of committees, grouped into seven different classes, are described in terms of size and composition, purpose and organizational characteristics, constituencies, and resource support required for effective work.

Schmidt, William D. The Executive and the Board in Social Welfare. Howard Allen, Inc., Cleveland, OH, 78 pp., 1959.
A basic analysis of the position of executive, its qualifications, duties, relations, problems. Chapter 6, "The Executive as Enabler," goes into some of the details of board-executive relations.

Sorenson, Roy. The Art of Board Membership. Association Press, New York, NY, 160 pp., 1950.
An amusingly illustrated introduction to boardmanship; it is written with the new member in mind and covers all important areas.

_____. How to be a Board or Committee Member. Association Press, New York, NY, 64 pp., 1953.
A popular condensation of the author's Art of Board Membership.

Trecker, Harleigh B. Citizen Boards at Work: New Challenges to Effective Action. Association Press, New York, NY, 288 pp., 1970.

The most up-to-date of Dr. Trecker's books covers the following topics: the importance of boards today; the functions of boards; the board and the executive and staff; building the board; leadership; organization of the board as a work group; the meeting; the board and the community; and various aspects of board evaluation.

Trecker, Harleigh B. Group Process in Administration. Woman's Press, New York, NY, 330 pp., 1950.

This thorough introduction to the administrative process in social agencies has been enlarged and revised to include much illustrative material. It contains several useful chapters on boards and their management.



B. Papers and Journal Articles



"Do You Have What It Takes to be President of Your Board?" American School Board Journal, Vol. 161, No. 7, pp. 20-22, July 1974.
A test comprised of 30 questions designed to sharpen respondents' knowledge of board president responsibilities.

"How About a Couple of Hundred Ways to be a Better Boardman or Administrator?" American School Board Journal, Vol. 159, No. 8, pp. 39, February 1972.
Describes special features of the 1972 NSBA convention.

"School Boards and Scandals, Or: Remember That You Live in a Glass House." American School Board Journal, Vol. 162, No. 9, pp. 39-42, 45, September 1975.

Anderson, Bryce W. "How Not to Let Your Board and Superintendent Be Hoodwinked by 'Research'." American School Board Journal, Vol. 165, No. 3, pp. 42, 44, March 1978.
Board members might be well advised to regard with some skepticism most claims of "research proves" advanced by administrators and faculty representatives in promoting this or that new program or method. At the very least, some probing into alternatives is in order.

Anderson, Robert H. and Snyder, Karolyn J. "Leadership Training for the School Board Members: One Approach." Education, Vol. 100, No. 3, p. 227-34, Spring 1980.
A needs assessment produced the four themes (school board member role, communications linkages and processes, problem-solving and decision-making, planning) which provided the framework for a successful weekend leadership training workshop for Fort Worth (Texas) Independent School District School Board Members.

Ban, John R. "You're Taking Heat from More Sources than Ever, But Here's How to Keep Cool." American School Board Journal, Vol. 167, No. 10, pp. 36-38, October 1980.
Outlines the factors that cause stress in board members and the steps members can take to alleviate the stress. Urges board members to refuse to let the job become overwhelming.

Blanchard, Paul D. "If You're Jittery or Embarrassed Because Your School Board is 'Divided,' Maybe You Shouldn't Be." American School Board Journal, Vol. 164, No. 7, pp. 34, 36, July 1977.
A national survey of school board members helps explode myths about the divided school board. Dissent is a basic component of the decision-making process in a democracy.

Chait, Richard P. "Trustees and Tenure Review." AGB Reports, Vol. 19, No. 3, pp. 28-30, May/June 1977.
In individual tenure cases, the board is best off asserting in advance its right to decide about intervening and having review procedures in place. The need for experts and legal counsel is explored, and some rules for deciding on intervention are suggested.

Clark, Evelyn. "Board Power: A Game of Numbers." American School Board Journal, Vol. 168, No. 1, pp. 27-28, January 1981.
Offers suggestions on how a board member can best exert power, whether he or she is alone in his or her opinions, part of a committee, part of a minority on the board, or part of the majority.

Cole, Jacquelyn M. "Developing Effective Advisory Councils." Journal of Extension, Vol. 18, pp. 9-13, July-August 1980.
Presents a model of organized advisory councils containing three components: structural knowledge, programming skills, and group process skills. This framework can be used to train advisory council members and improve the effectiveness of extension programs.

Coleman, Peter. "School Boards as Policy-Makers." Paper presented at the Annual Metropolitan Fraser Valley Seminar of the British Columbia School Trustees Association (September 22-24, 1978), 30 pp., September 1978.
Decision-making in general and policy decisions in particular are the prime responsibility of school boards because policies are control mechanisms by which trustees assert local control. Policy decisions differ from others in their concern with values and purposes and the legitimization of the organization to society at large. Additionally, they tend to be broad in scope and relatively permanent attempts to guide or regulate lower-level decision-making. Rational models of decision-making in which policy-makers seek optimal alternatives amongst a wide range of choices are limited in application by practical issues such as time shortages. Conflict or political models are difficult to implement because finding the "optimal alternative" requires negotiating some consensus amongst pressure groups. One consequence of conflict models is to reduce significantly the role of expertise. In policy-making, boards need systematic ways of 1) identifying policy issues requiring attention, 2) prioritizing policy concerns, 3) arriving at decisions, 4) stating board policies, and 5) evaluating the effectiveness of policies. Boards with such skills and techniques are generally very effective at making policy decisions, and they provide excellent leadership in education.

Cryer, Roger E. "How to Keep the Feet from the Mouths of Your School Board Candidates." American School Board Journal, Vol. 162, No. 9, p. 46, September 1975.
Santa Clara County, California, school districts cooperate to hold workshops to educate school board campaigners. Six suggestions for holding similar workshops are included.

Cryer, Rodger. "Building a Board Team." California School Boards, Vol. 33, No. 3, pp. 12-15, March 1974.
A team system of district governance eliminates the wasted effort that comes from competition between board members and reinforces individual effort through helpful collaboration.

Cunningham, Luvern L. "Policy About Policy: Some Thoughts and Projections." Paper presented at the Annual Meeting of the National Conference of Professors of Educational Administration (34th, Norfolk, VA, August 10-15, 1980), 33 pp., August 1980.
In order to perform their proper functions without getting sidetracked by administrative details, school boards must establish a policy about policy. More is required than a set of rules codifying existing procedures. A school board must consider the educational focus of its decision-making responsibilities, the political factors affecting its policy-making, its legal role and responsibilities, and any other relevant factors before determining what kind of policy development processes are most likely to prove successful. Whole new notions of local school governance may result. This document offers 12 proposals that could help boards make policy about policy. These proposals concern the necessity for formal statement of policy, the establishment of educational policy as the primary focus of the board, frequency of policy-making work sessions, preparation of policy-making agendas years in advance, the length of superintendents' contracts, definition of evaluation criteria for superintendents, shifting of collective bargaining responsibilities to the state level, representation of professional educators on the school board, utilization of a disciplined framework for policy enunciation, training of board members and executive staffs in policy development processes, and sustained involvement of students, parents, citizens, and educators in policy development processes.

Davis, Bonnie E. "Rules of Procedure for Local School Boards." School Law Bulletin, Vol. 12, No. 3, pp. 1, 1-15, July 1981.
Rules of procedure designed for use by local boards of education are a modified version of "Robert's Rules of Order, Revised" and are intended to cover procedural rules not prescribed by state law.

Doing, Laura T. "How to Make Things Right When Your Public Loses Trust in Your Board." American School Board Journal, Vol. 165, No. 6, pp. 27-28, June 1978.
The first rule is to set the record straight. The public deserves to know what happened in a controversy even if the board members end up with egg on their faces.

Donoian, George. "Recognize and Acquire These Attributes of a Good School Board Member." American School Board Journal, Vol. 168, No. 2, p. 34, February 1981.
Lists criteria that contribute to being an effective school board member. Especially intended for a newly-elected board member.

Downey, Gregg W. "Why School Board Members Quit and Why They're Sometimes Glad They Did." American School Board Journal, Vol. 165, No. 2, pp. 26-29, February 1978.
Reports on a national survey of why board of education members quit. The most cited reason is demand on the member's time.

Drake, Jackson M. and Mangini, Margaret A. "School Board Training at Blackwater: A Process with a Product." Journal of American Indian Education, Vol. 20, No. 3, pp. 7-12, May 1981.
Consultants from Arizona State University and the Principal and Board of Trustees of the Blackwater Community School teamed together as partners and engaged in a process of school board training institutes endorsed by Public Law 95-561 which resulted in a policies and procedures manual for the operation of the school.

Endzel, Bruce. "A Lesson for School Boards in Crises: When Citizens Ask Questions, Answer Them." American School Board Journal, Vol. 161, No. 3, pp. 37-39, March 1974.
The experience of one school board in suburban Chicago emphasizes the importance of meticulous record-keeping by boards in making discretionary expenditures and the need for full and public disclosure when citizens ask questions about school expenditures.

Fenn, Dan H., Jr. "Executives as Community Volunteers." Harvard Business Review, Soldiers Field Road, Boston, MA 02163, 10 pp., March-April 1971.
The results of over 400 interviews are summarized and show--among other things--that businessmen tend not to act as leaders in their volunteer work and that their special talents are not fully utilized. An analysis of this situation follows.

Forer, Lois B. "The Obligations of Board Members." Social Service Review, Vol. 37, No. 2, June 1963.
This article is addressed to experienced board members. It is an advanced discussion of the legal, financial and managerial implications of the board member's job. The author was Deputy Attorney General of Pennsylvania and head of the Charities Division of the Department of Justice.

Iger, Arthur L. "How to Best Back the 'Junket' Charge." American School Board Journal, Vol. 165, No. 11, p. 36, November 1978.
Provides 16 suggestions board members can use to ease misinterpretations about travel to conventions. Among the suggestions are strict guidelines on expenditures and public announcement of the reasons why members are attending the convention.

Heller, Mel. "The Nine Opportunities That Make It All Worthwhile to Serve on a School Board." American School Board Journal, Vol. 163, No. 10, pp. 25-26, October 1976.



Johnston, Richard L. "Citizens Can Help Bamboozled Boards." American School Board Journal, Vol. 166, No. 10, p. 41, October 1979.
Citizen groups can help school boards by independently gathering faculty and administrator opinions without being a threat to either group, something that board-sponsored inquiry groups cannot do.

Jones, Philip G. "How to Train a New School Board Member -- and Ways to Help Seasoned Veterans Brush Up, Too." American School Board Journal, Vol. 160, No. 4, pp. 21-29, April 1973.
A 9-page curriculum for school boards.

Jordan, Roy U. "What Makes a School Board Effective -- or Ineffective? Someone Who's Been on the Firing Line Tells All." American School Board Journal, Vol. 161, No. 7, pp. 3-35, July 1974.
Once a year a formal session should be held in which the board analyzes itself through observation of the board's effectivenss made by superintendents, as well as a few principals, teachers, and students.

Lee, Helen Clara. "For New (and Some Old) School Board Members: How to Seem Smarter than You Really May Be." American School Board Journal, Vol. 163, No. 4, pp. 41-43, April 1976.
Advice to new board members about how to act with the media and constituents.

Lobsenz, Herbert M. "The Right Way and the Wrong Way to Cut a School Budget." American School Board Journal, Vol. 164, No. 9, pp. 27-28, September 1977.
The right way to create a district budget is for the board of education to get involved in the budget process before it starts and to shape all the work that is done on it by making sure goals and limits are understood.

McElheny, Thomas J. "How Boards Can Boost Productivity." American School Board Journal, Vol. 167, No. 11, p. 34, November 1980.
Boards of education can improve their own productivity by taking such steps as setting aside time to develop both immediate and long-term goals for the school system, establishing priorities among the goals set, beginning goals with action verbs, and indicating who is responsible for accomplishing the goals.

Neubauer, Antonia. "Here's Quick Help for New Board Members." American School Board Journal, Vol. 168, No. 6, p. 24, June 1981 (Reprint UMI).
Outlines ten steps that could be incorporated into training efforts to help new board members learn the ins and outs of school business.

Parker, Barbara. "Meet Sam Brown: Here's a Board Member with Clout, Brains, and Respect." American School Board Journal, Vol. 167, No. 3, pp. 36-37, 42, March 1980.
Profiles an outspoken member of the Council Bluffs (Iowa) board of education.

_____. "When a Board is This Divided, Almost Anything Can Go Wrong--and Does." American School Board Journal, Vol. 166, No. 2, pp. 21-25, February 1979.
Presents the difficulties the divided Memphis, Tennessee board of education had in choosing a superintendent.

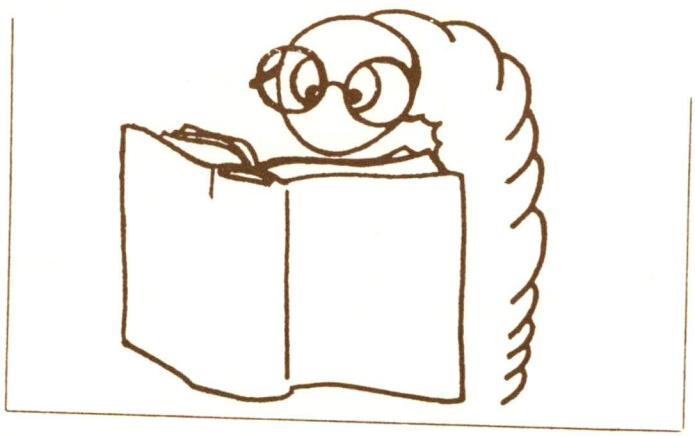
Patton, Michael Q. "With God on Your Side: When Not to Worry about Productivity." Social Policy, Vol. 9, No. 2, pp. 7-14, September-October 1978.
This paper examines the conditions under which it is appropriate to use a productivity framework for evaluating education and human service programs. It also discusses three specific limitations on the applicability of productivity analyses.

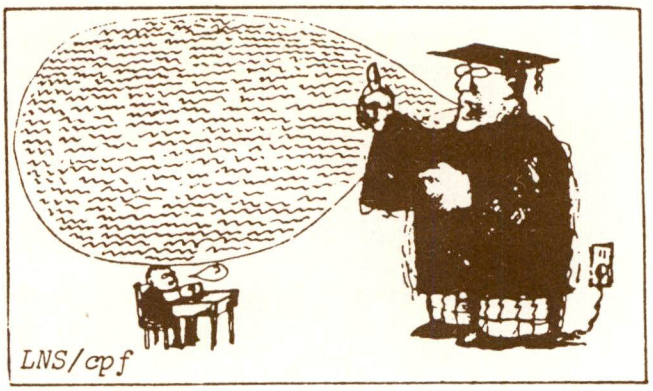
Pickhardt, Carl E. "The Truth Is, You Can Provide Leadership by Resisting Change." American School Board Journal, Vol. 166, No. 2, pp. 36-37, February 1979.
Outlines four basic types of change that take energy away from maintenance tasks: starting something new, stopping a program or activity, increasing the frequency or complexity of an activity, and decreasing the frequence or complexity of an activity.

Piper, Donald L. "Help for Beleaguered Board Members." School Management, Vol. 16, No. 5, pp. 20-21, May 1972.
Describes New York's 12 school board institutes which provide in-service training for school board members.

Poe, William E. "A Veteran Boardman's Advice: How to Deal with Controversy in Your District." American School Board Journal, Vol. 160, No. 2, Pp. 30-32, August 1972.

Renihan, P.J. and Renihan, F.I. "Investigating Control: A Framework and Some Research Findings." Paper presented at the Canadian School Trustees' Association Congress on Education (1st, Toronto, Ontario, June 17-21, 1978), 29 pp., June 21, 1978.
The control exerted by boards of education may be described by measuring what is controlled, what types of control are used, and at what level control is exerted. A model designed to measure these factors was tested in a random sample of 21 British Columbia school boards. The major findings revealed that school board decisions tended to concentrate in the operational areas of staff personnel, finance, and business management, while curriculum and instruction received the least attention. The majority of decisions made were at a routine or maintenance level rather than at either a policy-making or short-term level. An investigation of relationships between contextual variables and control revealed the tendency of boards making greater numbers of decisions to concentrate more on trivial matters than on policy matters. Greater local fiscal effort seemed related to greater involvement of boards in school-community relations decisions. Greater local fiscal effort and greater district size together seemed accompanied by greater board emphasis on curriculum and instruction. The report concludes with recommendations to school boards for effective use of time and effort, as well as recommendations for further research.





Riendeau, Albert J. "50 Ways to Get More Out of Your Advisory Committee." Paper presented at the 1978 Technical Assistance Conference, "Business-Industry-Labor Inputs into Vocational Education Personnel Development" (Columbus, OH, April 3-5, 1978), 18 pp., April 1978.

Preceeding a list of fifty ways to use advisory committees more effectively is a discussion on the expanding roles of vocational education and their advisory councils and on their relationship as a team. The list is intended to assist vocational instructors and administrators and is not meant to be exhaustive. The following ten examples are representative of some of the ideas included in the list: 1) involve members in planning ways for making occupational education available, attractive, and meaningful to all students without regard to race, creed, sex, religion, or geographical location; 2) send a reminder letter along with an agenda of the coming meeting to each member about two weeks before a scheduled meeting and invite suggestions for inclusion on the agenda; 3) provide members with maps of the campus to assist them in locating parking, meeting rooms, etc.; 4) inform the members about the pertinent actions and activities of the State Board for Vocational Education; 5) invite the members to school functions such as graduation, open house, special exhibits, athletic events, and plays; 6) encourage school administrators to reward the committee's efforts when particular goals have been achieved; 7) work through members to arrange a conducted tour of industrial facilities for school field trips; 8) put a name plate on donated equipment showing the contributing member's name and firm; 9) avoid unnecessary detail work for the advisory committee members; and 10) have in attendance at all committee meetings a representative of the occupational education department.

Riggs, James R. "Intimacy with Your Budget Can Make You a Wise Leader." American School Board Journal, Vol. 167, No. 10, pp. 23-25, October 1980.

After urging boards to take control of their district's budget, the author describes four kinds of budgets and offers advice on the role the board should play in each phase of the budget cycle -- preparation, formulation, adoption, and execution.

_____. "You are a Politician, so Why Not Be an Effective One? American School Board Journal, Vol. 166, No. 3, pp. 36-38, March 1979.

Presents six brief political lessons for school board members.

Riles, Wilson. "A Responsible School Board Has Promises to Keep." Updating School Board Policies, Vol. 5, No. 1, pp. 1, 4, January 1974.

Suggests that School boards exercise as a priority task their responsibility to serve as strong links between the schools and the public. Offers a recipe for an "accountability" annual report.

Ruys, Marie S. "Could You Be a Better Board Member Than You Are? Read This Veteran's Advice." American School Board Journal, Vol. 160, No. 8, pp. 38-39, August 1973.
New school board members need crash courses in boardmanship and basic educational principles. Such a move cannot help enhance their credibility rating with taxpayers, as well as lay the foundation for a new two-way relationship between administrators and policymakers.

Smith, R. Winfield. "How to Tell if You Have a Good School Board." American School Board Journal, Vol. 164, No. 9, pp. 17-19, 38, September 1977.
Poses four questions to use in assessing the quality of a board of education.

Thompson, Margery. "Protect our Family from the Slings and Arrows of Your Service on the School Board." American School Board Journal, Vol. 167, No. 4, pp. 60-61, April 1980.
Discusses the stress that service on the board of education places on board members' families and the ways some members cope with the stress.

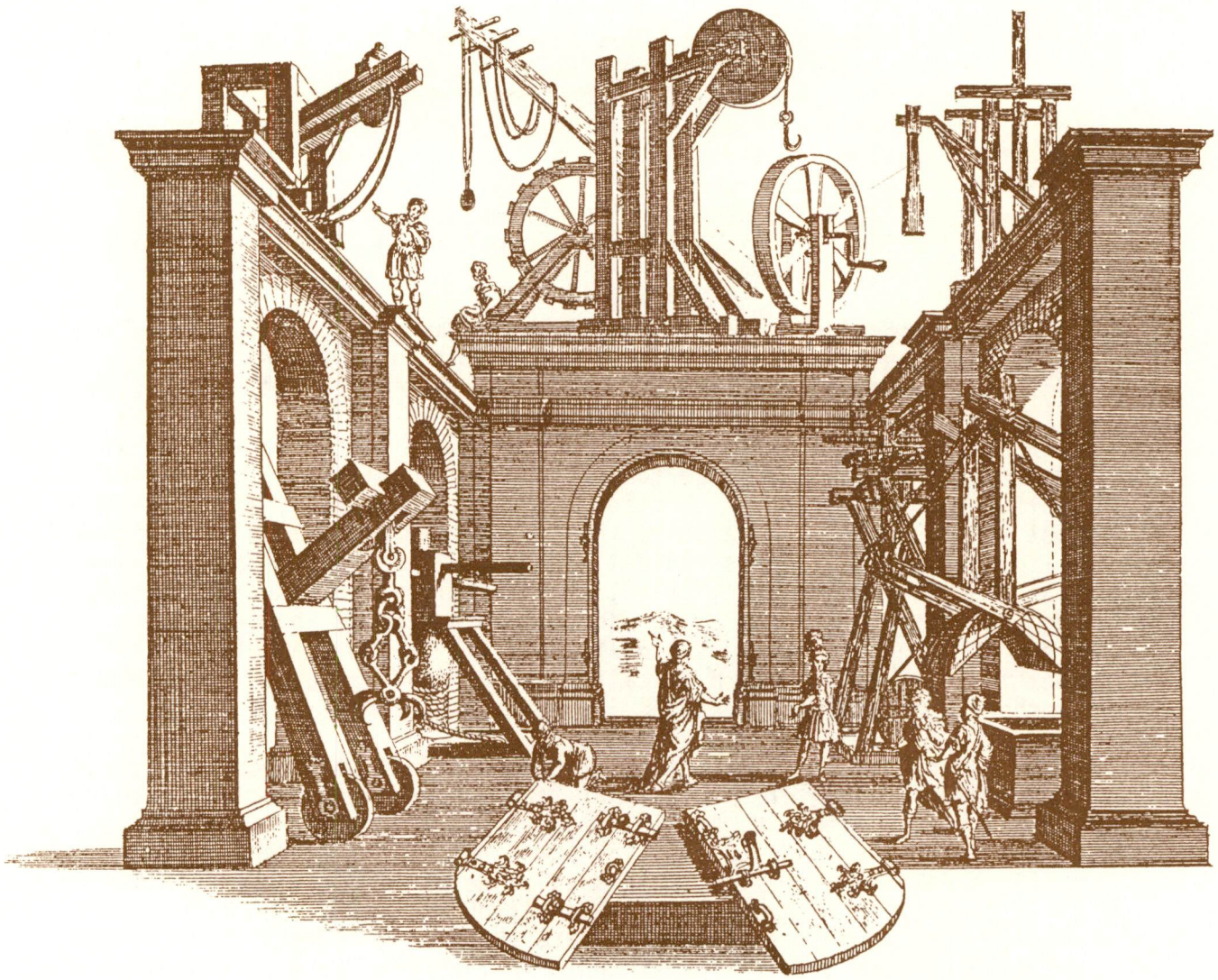
"When Your Board Wants Something, Does It -- Should It -- Play Politics?" Updating School Board Policies, Vol. 8, No. 1, pp. 1-3, 5, January 1977.
The question for school boards is no longer whether to become involved in politics, but how to stay alive in the political arena. Suggestions for staying alive are offered.

Weiss, Edmond H. "The Seven Deadly Sins of Bad Reasoning That Sabotage School Board Deliberations." American School Board Journal, Vol. 161, No. 5, pp. 51-52, May 1974.

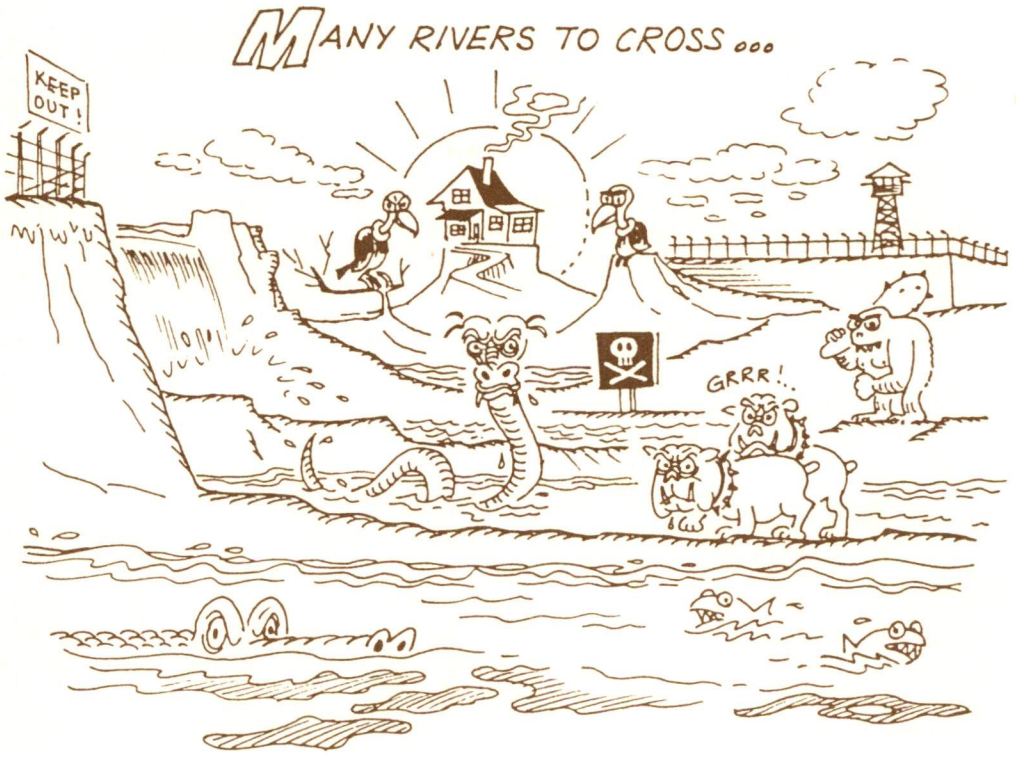
Wiles, David R. and Conley, Houston. "School Boards: Their Policy-Making Relevance." Paper presented at the Annual Meeting of the National School Boards Association (34th, Houston, Texas, April 1974), 24 pp., April 1974.
This paper contains two sections, each with a different author, that address the need to increase the effective role of school boards in public school governance. Section 1, by David K. Wiles, argues that most school boards are becoming increasingly irrelevant in educational policymaking and offers a radical alternative to the present arrangement that would counteract this trend. Section 2, by Houston Conley, suggests a training program for school board members that would improve their political and administrative skills and enable them to meet the demands of modern education and respond better to the needs of their constituents.

Ziegler, L. Harmon. "What Makes School Boards Effective?" Paper presented at the Annual Meeting of the National School Boards Association (36th, San Francisco, California, April 10-13, 1976), 15 pp., April 1976.
Two models may be used to describe school board governance. The democratic model defines effectiveness in terms of democratic criteria. It is characterized by vigorous competition for school board positions; board members are responsive to their constituencies; the superintendent acts as policy implementor rather than policy originator, and a chain of direct accountability is maintained among the public, the board, and the superintendent. The professional model dictates that board members should defer to the superintendent, who is the expert capable of making policy decisions most advantageous to the cli-

entele (students). Selection of board members should not be characterized by controversy over the issue, as in the democratic model. Each board member must decide for himself which model (and concept of effectiveness) is most desirable. The research on which these remarks are based indicates that school boards and superintendents often fail to ascertain what their communities want. There is little citizen participation in board policy-setting. In most cases, the board follows the lead of the superintendent in policy-making. One conclusion to be drawn from this data is that the professional model is the dominant one.



C. Pamphlets and Manuals



Goal-Setting and Self-Evaluation of School Boards. American Association of School Administrators, 1801 North Moore Street, Arlington, VA 22209 (Stock No. 021-00203), 21 pp., 1980.

Believing that school boards must continuously assess their own performance in order to act effectively, the National School Boards Association and the American Association of School Administrators produced this brief guide to self-evaluation for school boards. The authors recommend adoption of a written policy on goal-setting and self-evaluation and set forth the basic criteria for an effective program. A sample self-evaluation instrument is provided as a model to indicate the kinds of questions that are important to ask as well as aspects of school administration that ought to be addressed.

Beckwith, Miriam M. Formation and Uses of Lay Advisory Groups for the Humanities. Project Report No. 14, Center for the Study of Community Colleges, Los Angeles, CA, 9 pp., 1981.

Based on the experiences of several community colleges, this report examines successful and unsuccessful strategies utilized in the formation of lay advisory committees for the humanities. The report first presents brief descriptions of successful committee organization efforts at five institutions: Clark College (Vancouver, WA), Brevard Community College (Cocoa, FL), Shoreline Community College (Seattle, WA), Olympic College (Bremerton, WA), and the San Diego Community College District (CA). With variations, the descriptions include the name of a contact person; detail recruitment and selection procedures; and outline the role of the advisory committee in forming humanities honors programs,

assisting in program evaluation, maintaining liaisons with humanists in the community, and assuming other related responsibilities. The report then presents descriptions of unsuccessful efforts at three multi-campus districts. The report concludes with guidelines based on an analysis of these successful and unsuccessful efforts, revealing that: 1) committee success is dependent upon the support and enthusiasm of faculty and administrators; 2) committee functions must be articulated and involve members in meaningful, rather than perfunctory, tasks; and 3) multi-campus districts may have more difficulty in establishing advisory committees than single campus districts.

Camp Fire Girls. The National Council Certificate of Incorporation Bylaws of Camp Fire Girls, Inc. and National Policies on the Organization, Chartering and Operation of Camp Fire Girls Councils and Groups. New York, 1972.

A fine example of clear and detailed legal and operational rules.

Child Welfare League of America, Inc. Guide for Board Organization in Social Agencies. Child Welfare League of America, Inc., 67 Irving Place, New York, NY 10003, 1975.

This is a good pamphlet on how to get a board organization started or functioning smoothly again.

Decker, Virginia A. School Board Members and Community Education, Role Guide Series #2. Mid-Atlantic Center for Community Education, School of Education, Ruffner Hall, University of Virginia, Charlottesville, VA 22903, 26 pp., 1979.

This guide is the second in a series of eleven generated in 1978 as the result of workshops that focused on peer training, a different approach to teaching. The workshops provided the opportunity for members of eleven identified role groups to work together with peers to examine the relationship between their specific role group and community education and the ways in which they could stimulate their peers to improve role performance and effectiveness. This booklet focuses on community education as seen by local and state school board representatives. Topics considered include the power and responsibilities of school boards, benefits derived from and problems of community education, levels of school board involvement, program evaluation, board skills required for developing community education, and strategies for increasing interest and skills.

Drulan, Greg. Community Groups: Keeping Them Alive & Well. Keys to Community Involvement Series: 1. National School Public Relations Association, 1801 North Moore Street, Arlington, VA 22209, 25 pp., January 1978.

The first in a series of booklets developed for governing boards, community leaders, group members, administrators, and citizens suggests techniques that can be used to maintain interest and enthusiasm in a group. The point of view taken suggests that for a group to maintain a high level of productivity, it will periodically need to examine itself in three major areas. A group will need to provide for change in membership, it will need to be able to adopt new goals, and it will need to maintain a flexible attitude toward its procedures. The booklets in the series are designed to help group leaders and members strengthen their skills in group processes, work cooperatively with

others, and plan and carry out new projects. Topics include techniques to maintain enthusiasm in a group, ways that agencies can effectively use consultants, and factors that affect introducing and implementing new projects. The booklets in the series are adapted from a much more comprehensive set of materials and training activities developed and field tested by the Northwest Regional Educational Laboratory over the past several years in dozens of locations throughout the western United States.

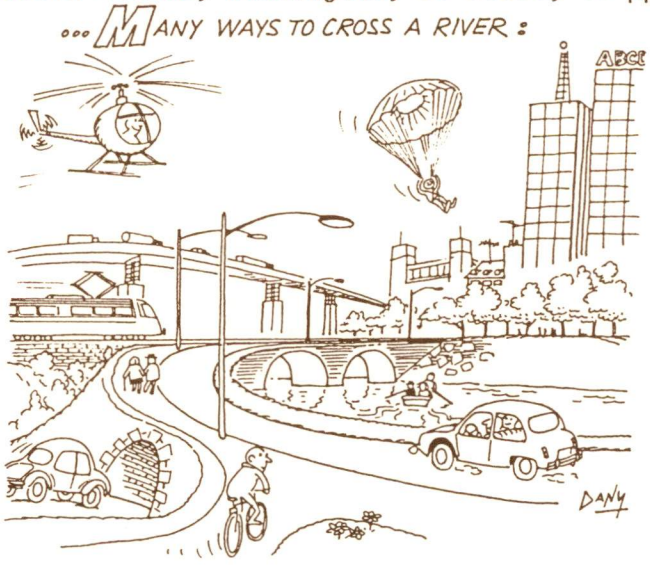
Federation of Settlements and Neighborhood Centers. The Board of Directors of a Neighborhood Center. Federation of Settlements and Neighborhood Centers, New York, NY, 1960.

Foster, Badl G. The Orientation and Training of School Board Members. A Position Paper Prepared by the Recruitment Leadership and Training Institute. Recruitment Leadership and Training Institute, Philadelphia, PA.
This booklet is intended to encourage and aid local school boards in undertaking training programs that will enable them to function more effectively. Relying heavily on case studies of school boards in Chicago and Minneapolis, the author focuses on two major problems facing school board members today--the phenomenon of increasing bureaucratization and the challenge of desegregation. Chapter 1 discusses the nature of school boards and the challenges facing them today. Chapter 2 focuses on the experiences of school board members in Chicago and Minneapolis. Chapter 3 comments on the practices of school boards in general and the Chicago and Minneapolis boards in particular. Chapter 4 presents the author's conclusions about the selection and training of school board members and offers specific suggestions for training board members to meet the demands of their position.

Girl Scouts of America. Basic Workbook for Board Members. Girl Scouts of America, 830 3rd Avenue, New York, NY 10022, Cat. No. 19-928, Parts I and II, 171 pp.
A collection of programmed lessons for Board Members that are arranged in order of increasing difficulty. The point of view is that of the Girl Scouts, but the method is of general interest.

_____. President's Workbook. 55 pp., Cat. No. 19-929.
A programmed guide to the President's leadership role, administrative role, and representative role.

Goodwill Industries. Directors Manual. Goodwill Industries of America, Inc., 9200 Wisconsin Avenue, Washington, DC 20014, 40 pp., 1969.



A clear, well-organized and simple guide to the following board-related subjects: functions of the Board of Directors, leadership, well-planned meetings and agenda, tenure and Committee structure, the Board's role in the management of the organization, executive-board relations, board philosophy, and a "job description" for each standing committee.

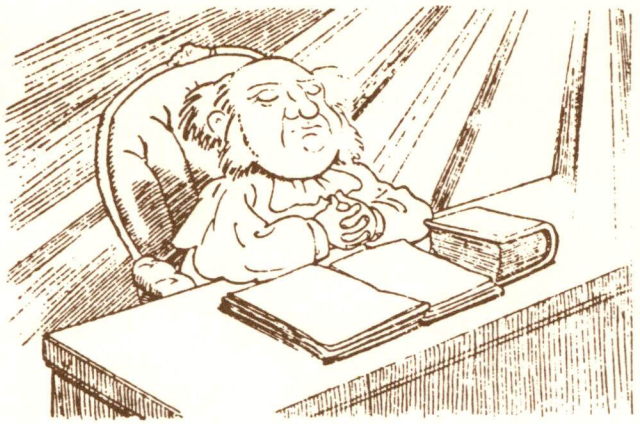
Hickcox, Edward S. Understanding School Board Operation in Ontario. 17 pp., January 1973.
Ontario school systems face problems in trustee-professional staff relationships, establishing community involvement in school affairs, developing policies whereby maximum use is made of resources available, and in increasing public awareness of what schools are for and what they are doing. These problems are discussed, and an ideal system for effective school board operation is described. The text concludes with a discussion of the problem of coping with, or the changing of, the organizational structure in which trustees must work.

Kunder, Linda H. Orientation Programs for New School Board Members. ERS Information Aid. Educational Research Service, Inc., 1815 North Fort Myer Drive, Arlington, VA 22209, 33 pp., 1975.
This publication discusses the value of orientation programs for new school board members and examines various possibilities for the structuring and presentation of such orientation programs. Approximately half of the publication is devoted to presenting examples of orientation programs and materials used by five state and local agencies that conduct orientation programs for new school board members. An extensive bibliography of relevant publications is also included.

Levin, Benjy. Improving Board Effectiveness: A Review of the Literature and a Proposal. Social Planning Council of Winnipeg, 501-177 Lombard, Winnepeg, Manitoba, Canada R3B OW6, 34 pp., September 1977.
This study is divided into two parts. The first part is an overview of the literature on boards. This includes consideration of boards of directors of business corporations, of school boards, and of social service boards. The review assesses this literature in terms of its relevance for improving social service boards. Also included is a detailed review of literature directly related to the improvement or training of boards of directors. Methods and materials are discussed. The second part of the report makes some suggestions about the kinds of programs that might be effective and gives some proposals for further action. Six models of board training are suggested--special seminars; retreats for a single board; institutes for board chairmen, executive directors, or board members; the provision of self-study materials and ideas; short-term consultation; and long-term consultation.

Lindsay, Margot. A Handbook for Citizen Boards and Councils--for Board Members. Institute for Governmental Services, University of Massachusetts, Amherst, MA 01003.
A detailed and well-written pamphlet on boards dealing with governmental functions. It goes over the boards and board members role in budgeting, advocacy, and keeping a board functioning and effective.

Planning for Lutheran High Schools. Steering Committee Handbook. Part One--Organization and Guidelines. Part Two--Subcommittees. H03. School Department, Board of Parish Education, 3558 South Jefferson, St. Louis, MO 63118, 29 pp., 1978.



This booklet describes the role and activities of the steering committee and its subcommittees during the survey phase and planning phase of a new Lutheran high school. All the steps that are to be taken in determining the feasibility of starting a new Lutheran high school in the community are outlined. Other information includes a job description for the steering committee and five subcommittees, a sequential list of each major activity and its subpoints, suggestions of whom to involve, suggested communication procedures, sources of information, and references to other materials that are available. The booklet also defines the interrelationship between the subcommittees, steering committee, and the church structure.

Mathiasen, Karl. Confessions of a Board Member. The Alban Institute, Wisconsin Avenue & Woodly Road NW, Washington, DC 20016, 1976.
This brief pamphlet discusses the dynamics of boards, particularly governing bodies of church parishes and congregations.

National Association of Hearing and Speech Agencies. Thomason, Bruce. Community Planning for the Rehabilitation of Persons with Communication Disorders. National Association of Hearing and Speech Agencies, 919 18th Street, N.W., Washington, DC 20006, 65 pp., 1967.
This manual for agency personnel and board members covers all phases of agency operations and board and volunteer management; the goal of rehabilitation of the communicatively handicapped provides a special focus.

National Council for Homemaker-Home Health Aid Services, Inc. Approval Program. National Council for Homemaker-Home Health Aid Services, 1740 Broadway, New York, NY 10019, 68 pp.
A questionnaire for applying agencies including a section on board composition.

National Federation of Settlements and Neighborhood Centers. Standards for Neighborhood Centers. National Federation of Settlements and Neighborhood Centers, 232 Madison Avenue, New York, NY 10016, Order #910-68-1-1M, 31 pp.
A careful definition of the neighborhood center in relation to the family and the community; general guidelines for all aspects of its operations.

_____. "Settlements and Neighborhood Centers" by Arthur Hillman. Encyclopedia of Social Work, National Association of Social Workers, 6 pp., 1965. (Order #950-67-7)
A short history and a detailed definition of neighborhood centers; an analysis of trends and a summary of federations at all levels.



"For too long, I have been guilty of the crime of silence."

_____. "New Directions for the Settlement Movement: Report of the New Directions Committee." 10 pp., 1969.
This little book is full of suggestions on how settlement houses can respond better to the new demands made on them.

National Jewish Welfare Board. Brodsky, Irving. Manual for Board Members: A Guide to Service. National Jewish Welfare Board, 15 East 26th Street, New York, NY 10010, 54 pp., 1972.
Relevant sections outline the responsibilities of center boards, the jobs of members, officers and of the various chairmen, the optimum composition of the board, and committee structure, responsibilities, and procedures.

Policies for Coping with the Critics. A School Board Policy Development Kit. National School Boards Association, State National Bank Plaza, Evanston, IL 60201 (Cat. No. 70-60), 28 pp., December 1970.
Written school board policies can demonstrate that boards welcome ideas from the people, that there are proper procedures for getting a hearing on complaints, and that staff and curriculum will be protected from pressure. The sample school board policies, administrative rules, and information statements in the kit are intended to facilitate the task of developing good procedure in several pertinent policy areas--the handling of complaints, the teaching of controversial issues, and academic freedom. Criteria for evaluating a board's responsiveness to the community, suggested forms for reconsideration of books or social studies materials, and a guide to further reading are also provided.

Training New School Board Members: A Survey. Research Report Number 1973-2. National School Boards Association, 1055 Thomas Jefferson Street, N.W., Washington, DC 20007, 8 pp., 1973.
This report examines the training received by a sample of 30 new board of education members. In addition to the new school board members, superintendents and board presidents in 30 California school districts were surveyed to determine new board member training needs. The first training priority listed by both new board members and the superintendent was developing good working relations with the superintendent. The researcher recommends that training programs have formal objectives and be tailored to the local district's needs.

New Haven Council of Social Agencies. The Board Member: A Guide to Discharging of Administrative Responsibilities for Social Work. Yale University Press, New Haven, CT, 46 pp., 1936.
This early manual contains very detailed checklists of things to keep in mind for good board management.

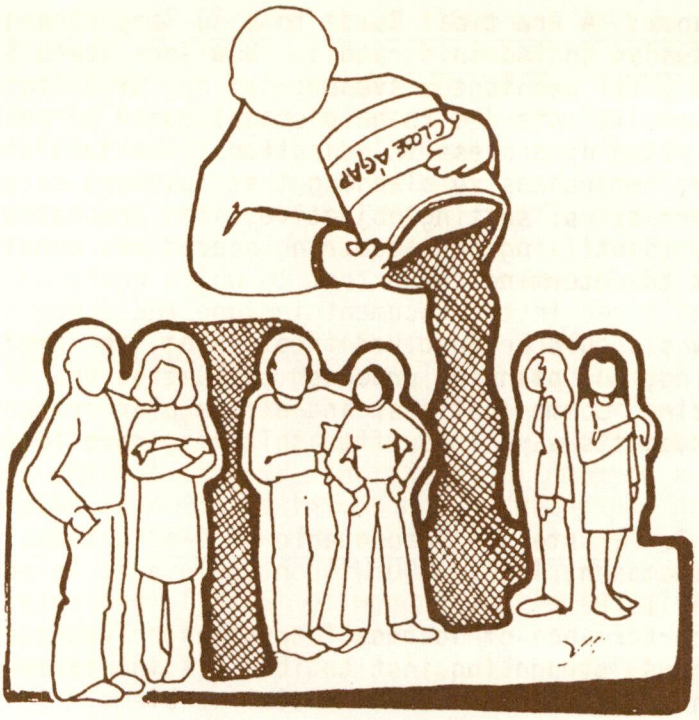
Planning Handbook: A Practical Guide to Long-Range Organizational Planning for School Boards and Administrators. New York State School Boards Association, Inc., 111 Washington Avenue, Albany, NY 12210, 24 pp., 1973.
This handbook is intended to help school board members promote and guide the planning process in education. The guide is directed toward long-range, comprehensive planning that involves setting goals, considering alternatives, setting objectives and strategies for accomplishing the goals, identifying and acquiring needed resources, and evaluating the system to determine the extent to which goals are accomplished. Topics considered in the document include the scope of the planning process, who should be involved in planning, the organization required for planning, the planning process, evaluation and accountability, recordkeeping, communications, and errors planners should avoid. The appendix suggests ways to outfit a planning room to facilitate good planning.

Pray, Francis C. Trustees: Accountable or Discountable. Frantzreb, Pray, Fenner and Thompson, Inc., 1500 Wilson Boulevard, Arlington, VA 22209, 4 pp., December 1972.
The poor performance of boards of trustees, often a characteristic of the so-called "struggling institution," is identified as a symptom of trouble in institutions with financial problems. In scores of colleges studied, very few boards of trustees were found who met the standards of composition, organization and performance necessary for solution of basic institutional problems, including the financial crisis. Where boards have been strong, well-organized and committed, the institutions, though facing financial pressures, still view the future with expectation of success and continued viability. Weak boards were found in institutions in deep trouble. Implications of these relationships are discussed. It is suggested that trustees as well as management must be held accountable for institutional performance. Possible legal actions, such as class action suits against trustees evidencing neglect are considered. Most of the problems of institutions focus primarily on one function of management--financial stability--but trustees also have ultimate responsibility for policies defining educational objectives, faculty support, and student cocurriculum.

_____. Contract with a College Trustee. Frantzreb, Pray, Fenner and Thompson, Inc., 1500 Wilson Boulevard, Arlington, VA 22209, 7 pp., 1975.
A sample contract for college trustees is presented that provides a way to rate individual trustee performance against certain norms that should characterize an effective trustee relationship with the college or university he serves. The contract is written as an agreement between a college board of trustees and a prospective trustee invited into membership. Terms and conditions for both the institution and the trustee are outlined.

Saif, Philip S. On Evaluation: For Members of Boards of Education. Capitol Region Education Council, West Hartford, CT, 21 pp, 1974.
The definition and purposes of evaluation are explained in this booklet addressed to members of boards of education. Evaluation provides information to the school board enabling them to make decisions about goals, personnel, administrators, and programs. Some guidelines are offered regarding responsibility in personnel and student evaluation.

Seay, Ruth H. Building a Better Board. W.K. Kellogg Foundation, 400 North Avenue, Battle Creek, MI 49016.
This is a description of two Battle Creek seminar series on building a better board and gives information on how to conduct a similar series yourself.



Thompkins, Leslie J. Boards and Committees in the YMCA. Association Press, New York, NY, 1958.

Guidelines to Successful Advisory Council Organization. Tuskegee Institute, AL, 12 pp., August 1967.
Guidelines for advisory councils in centers and counties where Seasonally Employed Agricultural Workers' Programs are operated are suggested in this document. Objectives, membership, meetings, officers, functions, program development, council members' purposes, and in-service programs are covered. A constitution and by-laws for advisory councils concludes this handbook.

United Neighborhood Houses. Rogers, B. Pendleton. More Neighbors on the Board--What's Holding Us Back? (Mimeographed material) United Neighborhood Houses, 101 East 15th Street, New York, NY 10003, 1966.
A frank and informed discussion of the causes of the widespread reluctance to make neighborhood house boards more representative.

Weber, Joseph. Managing the Board of Directors. The Greater New York Fund, 99 Park Avenue, New York, NY 10016, 1975.
This is a useful, straightforward document dealing succinctly with the principles of recruiting and organizing a board, board/staff relations, legal responsibility, orientation, and planning board meetings.

Weiz, Suzanne and Wynn, Patricia. An Examination of the Literature on the Function and Responsibilities of Board of Directors in Not-for-Profit Organizations. Community Service Society of New York, NY, 12 pp., November 5, 1980.
A review of the literature on the functions and responsibilities of the board of trustees in nonprofit organizations shows the following as major areas of responsibility: 1) determination of agency policy and assumption of the ongoing role of monitoring performance against established policies; 2) allocation of the organization's resources, includ-

ing budget review and audit functions; 3) appointment and evaluation of an executive director; 4) public relations (broadly defined as fostering the wider poblic's acceptance of the organization's established policies and includes the issue of maintenance of public confidence). Functions cited less frequently include the establishment and review of personnel policies, fund raising, recruitment of new board members, and consumer consultant participation. (An annotated bibliography on the role and functions of the board of trustees constitutes the major portion of the document.)

Wilson, Robert E. School Board Policies: What Are They? How to Write Them. Ohio School Boards Association, Columbus, OH, 47 pp., 1976.
Policy-making is the most identifiable area of responsibility for a board of education. To discharge this responsibility effectively and to ensure a worthwhile educational program for the students of the district, each board member and administrator must have a clear understanding of what policies are and how to write them. This booklet provides a concise explanation of the board's role in policy-making along with specific guidelines on how to fulfill that role. Appendices contain sample policies and a questionnaire for inventorying board of education beliefs about education and educational management.

Young Men's Christian Association. The Board of Management of a Branch. (Mimeographed Material) National Board of Young Men's Christian Associations, 291 Broadway, New York, NY 10007.
A formal definition of board of management; duties, policies, procedures are all carefully outlined. A useful guide in writing by-laws.

_____. Authorization, Power, Functions, and Duties of a Board of Directors. 3 pp.
A terse statement of authorization, powers, functions, and duties.

_____. The Volunteer Professional: What You Need to Know. Strauss Communications, Inc., YMCA: Call for Action, 888 7th Avenue, New York, NY 10019, 15 pp, 1972.
This is an attempt to define the rights and duties of the volunteer professional. A model agreement is included that would bind the agency to provide job descriptions, training, advancement to more demanding work, and evaluations, as well as good working conditions, insurance coverage, and indemnities for volunteer professionals. On the other hand, the volunteer professional would agree to work regular hours, to accept training in all necessary phases of the agency's operations or of the volunteer's task, to coordinate his activities with those of the paid staff, etc. A very interesting booklet.



3

TRAINING RESOURCES



FOR BOARD TRAINERS AND ADMINISTRATORS

A. Books

Brown, Courtney and Smith, Everett. The Director Looks at His Job. Columbia University Press, New York, NY, 1957.

Connors, Tracey Daniel. The Non-Profit Organization Handbook. McGraw-Hill Book Company, New York, 1980.

This handbook provides practical guidelines on every aspect of successful management in non-profit organizations. More than 25 experts offer how-to advice on planning and developing the 6 major areas of management common to all non-profits: organization and corporate principles; leadership management and control; human resource management; sources of revenue; public relations and communications; and financial management and administration.

Ham, Clifford C. Public Administration, Public Accountability. Modules 1-10, Package XII. Pittsburgh University, Pittsburgh, PA, 278 pp., June 1977.

This study guide comprises a portion of the National Training and Development Service Urban Management Curriculum Development Project. The ten modules included in this package examine the concept of accountability as it applies to public officials. The first module introduces the concept. Modules Two and Three discuss citizen participation and decentralization policies. Modules Four through Eight center on skills and strategies which public officials can use to maintain contact with citizens and to improve accountability. Module Nine presents techniques for evaluating accountability, level of participation, and the effectiveness of decentralization. Module Ten discusses some principles of administration related to citizen participation and decentralization.

Johns, Ray. Executive Responsibilities. Association Press, New York, NY, 1954.

Koontz, Harold. The Board of Directors and Effective Management. McGraw-Hill, New York, NY, 1967.

Rogers, Jean L. and Howard, Lawrence C. Public Administration, Management of Human Resources, Modules 1-10, Package XIII. Pittsburgh University, Pittsburgh, PA, 399 pp., 1976.
This instructional package represents a portion of the National Training and Development Service Urban Management Curriculum Development Project. The purpose of this package is to provide a general understanding of public personnel administration. It is intended to introduce the beginning student to the purposes, goals, and function of personnel administration in public organizations. The ten modules included in the package are: 1) Manpower Planning; 2) Selection; 3) Affirmative Action; 4) Testing; 5) Performance Evaluation; 6) Transfer and Promotion; 7) Training and Development; 8) Classification and Career Systems; 9) Compensation; and 10) Discipline and Grievance. The package is designed for both independent study and for instruction in workshops.

Trecker, Harleigh. Building the Board. Linington Press, New York, NY, 1954.

Trecker, Harleigh B. and Trecker, Audrey R. How to Work with Groups. Association Press, 291 Broadway, New York, NY, 4th printing, 1958.
This book seems to be an "updated-in-layman's-terms-version" of the authors' earlier book, Group Process in Administration. It is simpler, easy to read, and written with the viewpoint of the group leader in mind.

Trecker, Harleigh B. Social Work Administration. Association Press, 291 Broadway, New York, NY, 1971.
This book is an updated and modernized version of the principal ideas in a number of the authors' earlier books. The book is oriented mostly to the administrator's point of view. It does have a good chapter on board work, drawing from his earlier book, Citizen Boards at Work.

_____. Group Process in Administration. Woman's Press, New York, NY, 1950.
This book is detailed, technical and well-researched. The author provides examples for all the ideas he covers. The book is written from the viewpoint of the administrator, and is related to this viewpoint. There is only one chapter dealing specifically with boards.



B. Papers and Journal Articles

"After You Shake Their Hands, Try This New Way to Train New Board Members Quickly and Profitably." American School Board Journal, Vol. 161, No. 5, pp. 33-35, May 1974.
In Keansburg, New Jersey, board members meet once every week; and workshops are a year-round effort.

"A Superintendent Tests His Board." American School Board Journal, Vol. 167,
No. 1, pp. 36, 46, January 1980.
A school superintendent gave his board a competency test. The idea was to get the members to learn more about the uses of tests and to provide subjects for in-service programs for the members. A portion of the test is included.

"One More Reason for Superintendent Failure: Naivete." American School Board Journal, Vol. 166, No. 3, p. 38, March 1979.
The naivete this superintendent displayed was in not asking his school board to put its directives in writing.

Armstrong, Harold B. "What Have You Done for Your Administration . . . Lately?" Kansas School Board Journal, Vol. 14, No. 2, pp. 15-16, 18-20, April 1975.
Stresses the importance of the management team and of management development programs to support the team. (Published by the Kansas Association of School Boards, 825 Western, Topeka, KS.)

Bartley, Mary Lou. "The Ways Superintendents and Board Members Coax Each Other to Agree." American School Board Journal, Vol. 164, No. 2, pp. 24-26, February 1977.
Superintendent and board members have political power that they can use to coerce, manipulate, negotiate, co-opt, and reach consensus. The variety and amount of power used will depend on personal value systems and the way in which one analyzes people and situations.

Bell, T.H. "The Challenge of Educational Leadership: State Boards and Results-Oriented Management." Speech given at the Annual Meeting of the National Association of State Boards of Education (New York, NY, October 7, 1974), 8 pp., October 1974.
The U.S. Commissioner of Education discusses how state boards of education can make themselves more effective on behalf of many critically important causes in U.S. education today. He argues that state boards must take a tough, unequivocal position on some of the gross inequities that have stood for so long. Additionally, the five most critical problems and performance gaps on which state activism should focus are shool finance equity, school district organization and boundaries, collective bargaining in education, education of handicapped children, and performance accountability in education.

Boushay, James M. "Shared Independent School Leadership: Is It Happening?" Independent School, Vol. 37, No. 2, pp. 18-24, December 1977.
A new partnership in independent education is developing, i.e., shared participation in shaping and making substantive decisions. Describes this trend in detail along with a definition of leadership, centralized and decentralized approaches to leadership, and four styles of governance basic to independent school leadership.

Cleary, Robert E. "Who's In Charge Here?" AGB Reports, Vol. 21, No. 21-26, November-December, 1979.
A survey showing how presidents and board chairpersons agree and differ in their interpretations of what is policy (board's responsibility) and what is administration (president's responsibility) is discussed. Significantly different responses regarded: 1) appointment of dean over faculty objections, 2) budget process, and 3) dispensing of birth control devices. Survey questions are included.

De Zonia, Robert H. "Acting Presidents Should Act Like Presidents." AGB Reports, Vol. 21, No. 6, pp. 32-36, November-December 1979.
Governing boards are advised to give an "acting" president full authority and responsibility. Conclusions include the following: 1) leadership must be exercised, 2) noncandidates should be appointed, 3) institutional staff must support the acting staff, 4) acting staff must be active and communicative with constituents, and 5) transitional period imposes heavy obligations.

Downey, Gregg W. "Power on a School Board: How to Get It and How to Use It Wisely and Well." American School Board Journal, Vol. 164, No. 7, pp. 19-21, July 1977.

Farnsworth, Alton U. "Administrator Assessment: A Must for School Boards." Catalyst for Change, Vol. 5, No. 3, pp. 18-20, Spring 1976.
Offers suggested guidelines for school boards to follow in evaluating the performance of their chief school administrator and presents a sample assessment form for evaluating administrative personnel.



Frantzreb, Arthur C. Trustee Chairmanship: Position and Function. Frantzreb, Pray, Ferner and Thompson, Inc., 1500 Wilson Boulevard, Arlington, VA 22209, 9 pp., 1972.

Aspects of how a board of trustees is designed to function, how its membership is selected, how it is educated, and how business is conducted are discussed. General characteristics of boards of both public or private institutions are identified, with emphasis on the role and responsibility of the chairman. Suggestions are offered regarding the tenure of chairpersons, relationships to chief executive, trustee meetings, policy making, kinds of trustees, functions of the executive committee, trustee advocacy and support for the board and institution, presidential evaluation, and disclosure of facts: Guidelines for the education of a new trustee and the continuing education of all trustees are offered.

Gilligan, Arlene. "Boards Should Help--Not Blame--Principals." American School Board Journal, Vol. 167, No. 3, p. 24, March 1980.

Recommends that board members initiate discussions with their superintendent over issues that relate to the role of the principal--goal-setting, motivation, professional development, problem-solving, coordination and control of the schools, and evaluation of administrative performance.

Herman, Jerry H. "How to Train New Board Members Tactfully." American School Board Journal, Vol. 167, No. 7, p. 37, July 1980.

A superintendent outlines the problems caused by a constant flow of new board members and suggests ways in which superintendents can help prepare new members for their jobs.

Holcomb, John H. "Superintendents Should Push Programs--Not Paperwork." American School Board Journal, Vol. 166, No. 6, p. 34, June 1979.

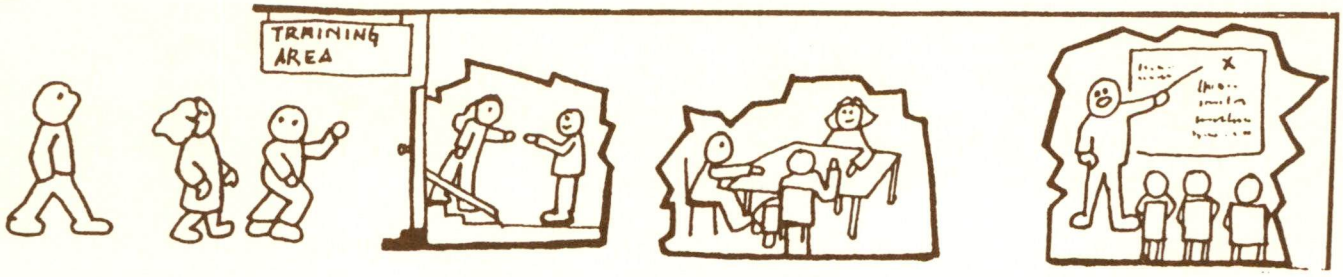
Argues that superintendents aren't educational leaders because they don't believe that boards want them to be, and then provides steps the board can take to encourage superintendents to become educational leaders.

Hoover, Carl, and Slezak, Jim. "This Board and Superintendent Defined Their Respective Responsibilities and Their Schools Are Better For It." American School Board Journal, Vol. 165, No. 5, pp. 38-40, May 1978.

Using a Decision Analysis Chart, the board and the superintendent determine which decisions are the superintendent's, which are the board's and which are shared and to what degree. A similar determination of responsibilities is made between the central administration and the principals and within the schools.

Humphreys, Edward H. "What It Takes to Develop a Good School Board Planning Unit." Education Canada, Vol. 15, No. 3, pp. 31-5, F1975.

Five major areas of activity within the planning function were described along with two minor areas. Planning tasks and competencies, the relationship of planning to other administrative units, the organization of the planning unit, and the interrelationship of the planning unit were discussed.



Humphries, Kenneth W. "This Evaluation Plan Lets You Know What Your Administrators' Jobs Are Worth." American School Board Journal, Vol. 168, No. 5, pp. 32-36, May 1981.
Offers guidelines on estimating the value of administrative jobs based on procedures long used in business and industry.

Jones, Johnny. "What Superintendents and Boards Can Do." Phi Delta Kappan, Vol. 60, No. 3, pp. 221S-222S, November 1978.
A strong superintendent and a strong board and an informed citizenry are the elements for education that can make the difference for our youngsters.

Jones, Philip G. "The Search for the Vanishing SUPERintendent." American School Board Journal, Vol. 162, No. 9, pp. 23-26, 49, September 1975.
Examines the characteristics and tenures of some superintendents and lists five suggestions for helping the board and superintendent work constructively together to resolve mutual problems.

Lewis, Robert L. "Building Effective Trustee Leadership, or How to Exploit Your Trustees." Educational Record, Vol. 61, No. 4, pp. 18-21, Fall 1980.
In order to help trustees fulfill leadership responsibilities, presidents should help them explore three areas of knowledge (the college, trends in higher education, and trends in society), identify and explore their specific governance responsibilities and behaviors, and guide them in balancing cost-effectivenss, quality and humanism.

Marcuse, Michael P. "The Superintendent as a Communicator." CAFP Journal, Vol. 18, No. 3, pp. 4-5, May-June 1980.
A discussion of some methods of communication that help broaden the decision-making process and implementation efforts necessary to successful educational leadership.

Mecklenburger, James A. "Ten Ways School Boards are Cooking Their Own." American School Board Journal, Vol. 163, No. 11, pp. 29-32, November 1976.
Outlines 10 ways school boards harm themselves.

Mullins, Carolyn. "Board Members Pinpoint the Kinds of Superintendents Who Embarrass Their Peers and Embattle Their Boards." American School Board Journal, Vol. 162, No. 2, pp. 23, 26-29, February 1975.
School board members discuss superintendent-school board relations and the errors superintendents commit in that relationship.

_____. "If Superintendents Could Pick Their Own School Board Members, Here's the Kind They Say They'd Choose." American School Board Journal, Vol. 161, No. 9, pp. 25-28, September 1974.
"Professionals" make the best school board members, say superintendents, with medical doctors their strong first choice and lawyers a distant second.

_____. "The Ways That School Boards Drive Their Superintendents up the Wall." American School Board Journal, Vol. 161, Vol. 8, pp. 15-19, August 1974.
According to a survey of superintendents, school board members are often unable to separate their own policymaking function from the administrative function of the superintendent.

Mundt, John C. "Who's In Charge Here?" Community and Junior College Journal, Vol. 49, No. 2, pp. 6-10, October 1978.
Explores the impact of increasing outside controls on the decision-making process and the operating prerogatives of presidents and local boards in areas such as accounting requirements, increasing data requests, contractual controls, contract enrollment procedures, dependence on advice of legal counsel, performance audits, program controls, and institutional operating budget controls.

Nelson, Norbert J. "Administrative Strategies Used and Their Effectiveness in Tension Situations." Paper presented at the Annual Meeting of the American Association of School Administrators (112th, Anaheim, CA, February 15-18, 1980), 9 pp.
Superintendents who come into conflict with their boards of education utilize a number of strategies with varying degrees of success. In this study, 77 Indiana school superintendents provided data on the strategies they use to resolve conflicts on their effectiveness. Superintendents indicated that "changing behavior" (communicating convincing evidence) was the most often used activity and proved highly effective. Used equally often and of equal effectiveness was "timing the approach," or delaying action until success seems more probable. Direct confrontation was the third most used strategy and was perceived to be moderately effective. Also moderately effective and fourth most often used was acquiescence. Fifth most used but rather ineffective was a bluffing display of high confidence. The sixth strategy in level of use and fifth in extent of effectiveness was soliciting support from others; although rarely used, this technique was found to be effective by those who used it. Finally, the least used and least effective strategy was to resign one's position.

Neubauer, Antonia. "Educating the Board of Education: Do's and Don'ts." Paper presented at the Annual Summer Conference of the American Association of School Administrators (3rd, Chicago, IL, July 6-9, 1980), 20 pp., July 1980.
High turnover rates among school board members, increasing complexity of school affairs, high costs of education, and demographic upheavals are among the factors that make efficient school board management very difficult. To cope with these factors, school board members need in-service training, particularly at the local level. Further, this in-service training should follow specific guidelines and be geared to both the unique needs of the district and the individual composition of the board. Districts, however, do not seem to be designing enough school board development programs that are both appealing to board members and effective. Thus, improvement is vitally needed in local in-service training efforts for school board members. Ten guidelines for creating a local in-service program are presented, as is the questionnaire concerning school board development that was distributed at the 1980 National School Boards Association convention.



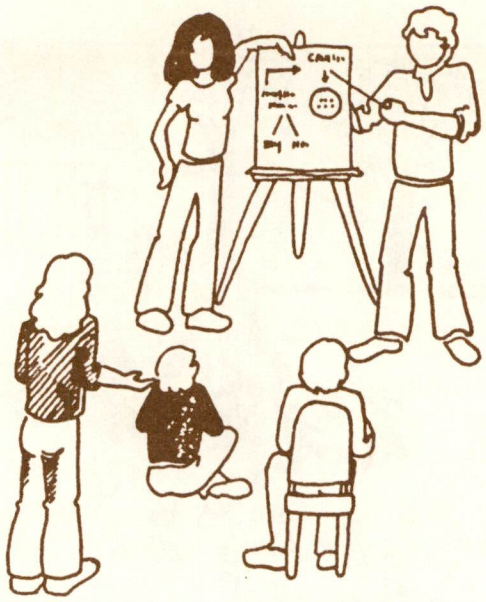
Nolte, M. Chester. "How Fast Is the Power of Superintendents Slipping Away?" American School Board Journal, Vol. 161, No. 9, pp. 42-46, September 1974.
While his responsibilities are growing rapidly, the superintendent's authority is shrinking. The board must tell its superintendent exactly what it is he or she is to be accountable for.

Parker, Barbara. "Uh-Oh: Your New Superintendent Is A Dud." American School Board Journal, Vol. 167, No. 7, pp. 24-25, 38, July 1980.
Offers advice to boards that are taken aback by the actions of newly hired superintendents. The advice ranges from giving the superintendent room to work to going public with the board's grievances.

Reimers, Barbara D. "How Board Members and Administrators Can Build a Working Team." Nation's Schools, Vol. 93, No. 4, p. 7, April 1974.
Describes common misconceptions school administrators and board members have about each other and suggests ways that the two groups can work together as a team.

Reimers, Barbara D. "Please, No Soft Soap or Insulting Chivalry." Updating School Board Policies, Vol. 5, No. 3, pp. 1, 4, March 1974.
Describes some techniques adopted by some administrators to frustrate the policymaking function of school boards. Suggests seven points to consider in developing a management team concept based on respect and honesty between administrators and board members.

Seiz, James E. "Evaluating Your President Objectively: A Message to Trustees." Paper presented at the National Meeting of the Association of Community College Trustees (Detroit, MI, 1979), 17 pp., 1979.
Board members, most of whom have never been in a position to employ, evaluate, and terminate a chief executive officer, must strive toward objectivity as they evaluate their college presidents. Central to this objectivity is: 1) an attempt on the part of the board member to place him/herself as much as possible in the place of the person being evaluated; 2) the elimination of subjective rating methods in the evaluation process; 3) a realization that the interpersonal skills of the president, i.e., the ability of the president to get along with faculty and



staff do not adequately measure institutional progress; and 4) an understanding of the shortcomings in evaluations made by students, faculty and other groups that are rarely cognizant of the total environment in which the college president must operate. To maximize objectivity in the evaluation process, college presidents should insist upon a formal evaluation procedure based on expectations incorporated in the president's job description. Such expectations should be measurable in terms of specific outcomes, and should be mutually agreed upon by the president and the board. A scoring mechanism should be employed when comparing actual performance with desired results. While objective evaluation methods may take more time to implement than short, subjective reviews, the accountability they foster will strengthen the board-president relationship.

Shannon, Thomas A. "The Board and the School System Administrative Team." Paper presented at the International Congress on Education (2nd, Vancouver, British Columbia, June 17-20, 1979), 7 pp., June 18, 1979.
According to this paper, all parties in educational management-central office and building administrators, supervisory and curriculum personnel, as well as the board, should participate fully in the business of managing a school district. But before enacting a new policy, an enlightened board will consider the impact that the policy could have on the school system's pupils, educational programs, personnel and budget. They can serve as agents of change, seeking advice from the entire team.
They can insist that all levels of management be included in the decision-making process of the district. Finally, a board can encourage management training and skills development of school administrators. The paper concludes with a discussion of the attitude of the National School Boards Association toward involvement of administrators in all levels of policy-making.

Shark, Alan R. "Now in Action: The Board-Mentor Service." AGB Reports, Vol. 19, No. 5, pp. 26-27, September-October 1977.
The AGB Board-Mentor Service provides member boards with on-campus workshops to assess their organization and performance. The basic role is to serve as a catalyst to engage boards in discussions of the results of a self-study and matters of special concern. Names of the 32 board-mentors are listed.

Smith, Fraser. "Consciousness Raising for Trustees." Change, Vol. 11, No. 1, pp. 16-18, February 1979.
Efforts of the Association of Governing Boards to keep trustees abreast of issues through publications, national meetings, and a new AGB board mentor service are described. The association's growth and successes are discussed.

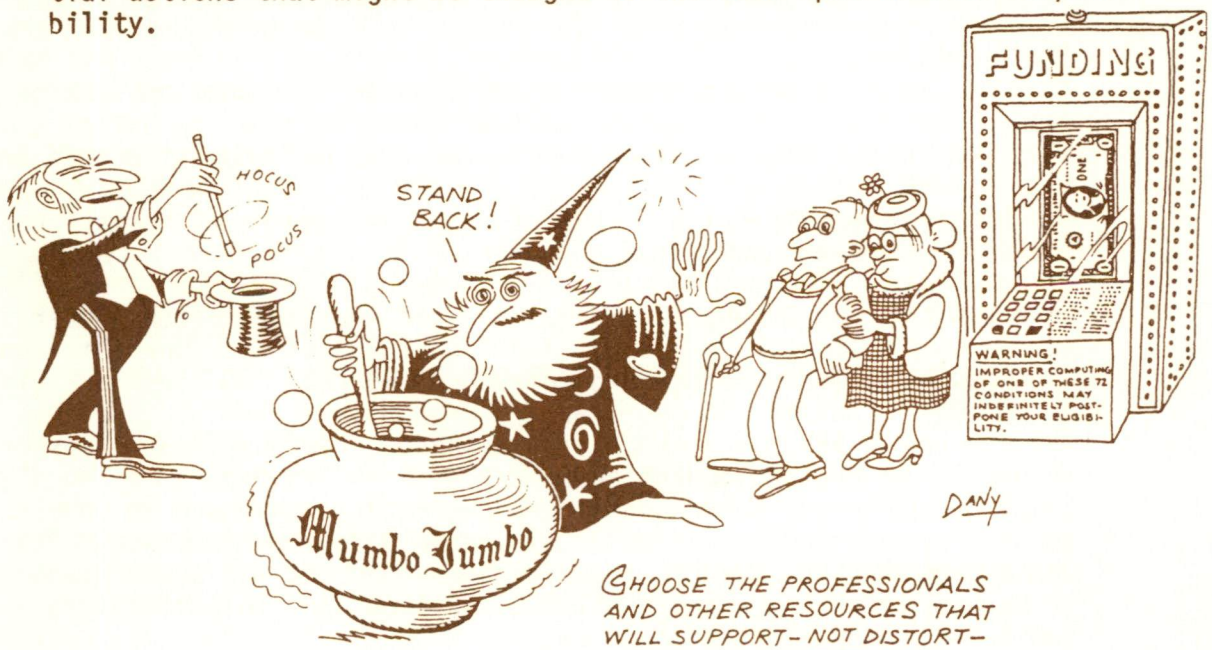
Thompson, Margery. "Bittersweet: How One Board and Superintendent Fared on Their Goals." American School Board Journal, Vol. 165, No. 8, pp. 32, August 1978.
Last year the superintendent of the Woodford County schools shared the district's goal-setting process with readers; this year a report on the district's accomplishments is presented.

White, Eileen. "How to Show New Board Members the Ropes--Without Being Strangled." Executive Educator, Vol. 1, No. 11, pp. 20-21, November 1979.
Superintendents explain methods they have used to introduce new school board members to the nature of the office they hold.

Wilson, Robert E. "What Board Members and Superintendents Really Mean When They Say What They Say." American School Board Journal, Vol. 168, No. 5, pp. 42-43, May 1981.
School boards do not always say what they mean when they list qualities they want in a new superintendent, and candidates for the office of superintendent are equally roundabout in their statements. This article explains the intent of some common statements made by both groups.

Wynn, Richard. "Follow These Ten Commandments When You Search for a New Superintendent." American School Board Journal, Vol. 168, No. 4, pp. 29-31, April 1981.
Offers advice for selection of a new superintendent.

Zwingle, I.L. "Crossing the Border." AGB Reports, Vol. 19, No. 5, pp. 41-42, September-October 1977.
In an informal poll of administrators and experienced board members, two short checklists were used. One consisted of trustee actions that might be considered invasions of administration, the other of presidential actions that might be thought to encroach upon trustee responsibility.



CHOOSE THE PROFESSIONALS AND OTHER RESOURCES THAT WILL SUPPORT - NOT DISTORT - WHAT YOU WANT TO DO -



C. Pamphlets and Manuals

American national Red Cross. Volunteer Leadership Development. Red Cross, National Headquarters, Washington, DC 20006, Cat. No. 320880, 60 pp., 1972.

An introduction to volunteer resources and their development for the use of executives.

The Association of Junior Leagues, Inc. Davison, Betsy. Guide to Board Training. Association of Junior Leagues of America, 825 3rd Avenue, New York, NY 10022, 65 pp., 1968.

This manual is an imaginative and well-organized guide for the nominating and education committees.

I Pre-orientation: prepared forms for gauging past work, experience, and training of new members and new chairmen as well as their attitudes to their own training, past and future.

II Board orientation: role of board, individual responsibility, committee interrelationships, program and resources, agenda for sample orientation sessions and role-playing situations; case studies.

III Committee orientations: guidelines for orientation sessions and for regular meetings as well as for effective schedules, discussion techniques, visual aids, reports, and committee self-analysis.

IV Continued training: subjects to cover, methods, tests, checklists, and evaluations.

Booth, Ronald R. and Glaub, Gerald R. Planned Appraisal of the Superintendent, A Performance-Based Program for School Boards and Superintendents. A Handbook. Illinois Association of School Boards, 330 Iles Park Place, Springfield, IL 62718, 88 pp., 1978.

This handbook and the accompanying workbook grew out of a series of workshops on superintendent appraisal designed to find a way to clarify and strengthen the board-superintendent relationship and to enable boards to constructively evaluate superintendent performance. The guidelines are intended to acquaint board members and superintendents with some important principles of evaluation and, in particular, with performance appraisal procedures.

_____. Ten Exercises Toward Planning a Superintendent Appraisal System. A Companion Workbook of Planned Appraisal of the Superintendents. Illinois Association of School Boards, 330 Iles Park Place, Springfield, IL 62718, 85 pp., 1978.
This workbook is intended to help the school board and superintendent tailor a performance appraisal system to suit their own needs. It consists of ten separate exercises that guide the board and superintendent through the planning and decision-making that must precede successful performance appraisal. The workbook contains exercises through which the board and superintendent will 1) determine what they want from evaluation, 2) deal constructively with board member concerns related to the traits, skills, and behavior of the superintendent, 3) reach agreement on how to conduct regular appraisal of the superintendent's performance, and 4) provide a sound basis for appraisal of past performance and for planning future directions.

Boys' Clubs of America. Guidelines for Organizing and Conducting a Board Member Conference. National Field Services, Boys' Clubs of America, 771 1st Avenue, New York, NY 10017, 8 pp.
Contains useful sections on staff's relation to the conference and on the conference committees as well as a suggested assignment list.

Community Council of Greater New York. The Weekend Retreat: Three Community Experiences. Community Council of Greater New York, 225 Park Avenue South, New York, NY 10003, 20 pp., 1971.
The experience of three communities--St. Louis, Dallas, and Flint--with weekend retreats on Jewish volunteer leadership.

Council of Jewish Federations and Welfare Funds, Inc. Leadership Development: Community Experience and Guidelines. National Welfare Funds, Inc., 315 Park Avenue South, New York, NY 10010, 63 pp., 1959.
A summary of the experience of more than 75 leadership development programs throughout the United States and Canada. The method of presentation, which makes liberal use of quotations, preserves the styles and points of view of the many local committees involved.

Federation of Protestant Welfare Agencies, Inc. Steps Toward Broader Board Leadership: Summary Report of the Workshop on Building and Strengthening the Board, Conducted by the Board Members' Education Committee. Federation of Protestant Welfare Agencies, Inc., 281 Park Avenue South, New York, NY 10010, 12 pp., 1955.
Responsibilities and functions of the board; criteria for board membership and role of nominating committee; suggestions for sustaining the interest of board members.

_____. Twenty-Fifth Board Members' Institute and Regional Winter Workshop: Agency Policy--Who Makes It--Who Controls It? 39 pp.
Papers of general usefulness to board members concerning the problems of welfare organizations today.
Small sections on board committee structure (pp. 34-35) and on board-staff relations (pp. 35-36).

_____. Highlights from the Institute for Directors and Board Members of Day Care Centers. New York, NY, 6 pp., 1970.
Boards of today: their function, relation to membership, to director, to the center, and to the community. Discussion of policy-making and of parents as board members.

Florence Crittenton Association of America. Weber, Joseph. Board Member Institute: Fall 1970. (Mimeographed material.) Florence Crittenton Association of America, Inc., 201 North Wall Street, Chicago, IL 60606.
The collected material from the conference includes the "Board Discussion Guide," "Selected Case Problems," "The Definition and Purposes of a Job Description," "Personnel Policy Outline," and a bibliography.

Frantzreb, Arthur C. and Marcus, Melvin M. Trustee-in-Residence: A Proposal for Improved Governance. Frantzreb, Pray, Fenner and Thompson, Inc., 1500 Wilson Boulevard, Arlington, VA 22209.
A trustee-in-residence plan is proposed as a possible solution to the problem expressed by governing board members who feel they rarely have the opportunity to develop any real knowledge about their institutions. The plan calls for establishment of a permanent, rotating residency program to permit really interested members to spend most or all of a week on campus. Preferably they should live in a student residential setting, attend classes and seminars and sessions of the Student Council and other student interest groups; eat in residential dining rooms, student union cafeterias, faculty dining rooms; attend Faculty Senate and other faculty meetings; and sit in on the president's cabinet and/or other administrative sessions. Trustees-in-Residence should also attend some of the cultural events, religious services, intercollegiate and intramural activities, as well as have time and opportunity set aside for informal confrontations with students, faculty and administrators.

Girls' Clubs of America. Board Vanguard Instructor's Manual. Girls' Clubs of America, Inc., 133 East 62nd Street, New York, NY 10021, 18 pp., 1969.
A guide for the use of education committees with six sample sessions and much other practical material.

Girl Scouts of America. A Guided Tour of Your Organization. Girl Scouts of America, 830 3rd Avenue, New York, NY 10022, 18 pp., 1969.
This booklet is addressed to presidents. It is a programmed course in good board practice. The reader is not passive, but is asked continually to answer questions in writing, solve problems, and relate to earlier or later sections of the book.

_____. Board Members' Design for Learning: Supplement, Part 1. New York, NY, 1972.
"Could We Do Better?"--a plan for gradually introducing a busy and/or reluctant board to "some learning" and ways to help the members recognize the board's needs. Filing cards with brief "capsules of learning."

_____. Guide for Board Training. From President's Resource Kit.
Transcript of tape "Guide for Board Training," suggested welcoming letter for new board members, feedback and evaluation, feedback tally sheets, sources of resources.

Hickcox, Edward S. Assessment of Senior Officials or How to Get the Goods on the Chief Executive Officer. 8 pp., June 1972.
Assessment of senior officials, according to this report, is designed to improve performance in terms of systems objectives. Assessment is defined as the measurement of the distance between performance desired and performance achieved. The author suggests that in developing an evaluative system the school system should first spend a lot of time,

money, and effort in choosing administrators. In addition, he recommends development of a system for a non-threatening performance. The system recommended by the author is essentially a management-by-objectives approach. The author contends that an assessment program should ensure that expectations held for a system's educational program by trustees and administration officers be congruent.

Lindsay, Margot. A Handbook for Citizen Boards and Councils--for Administrators. Institute for Governmental Services, University of Massachusetts, Amherst, MA 01002.

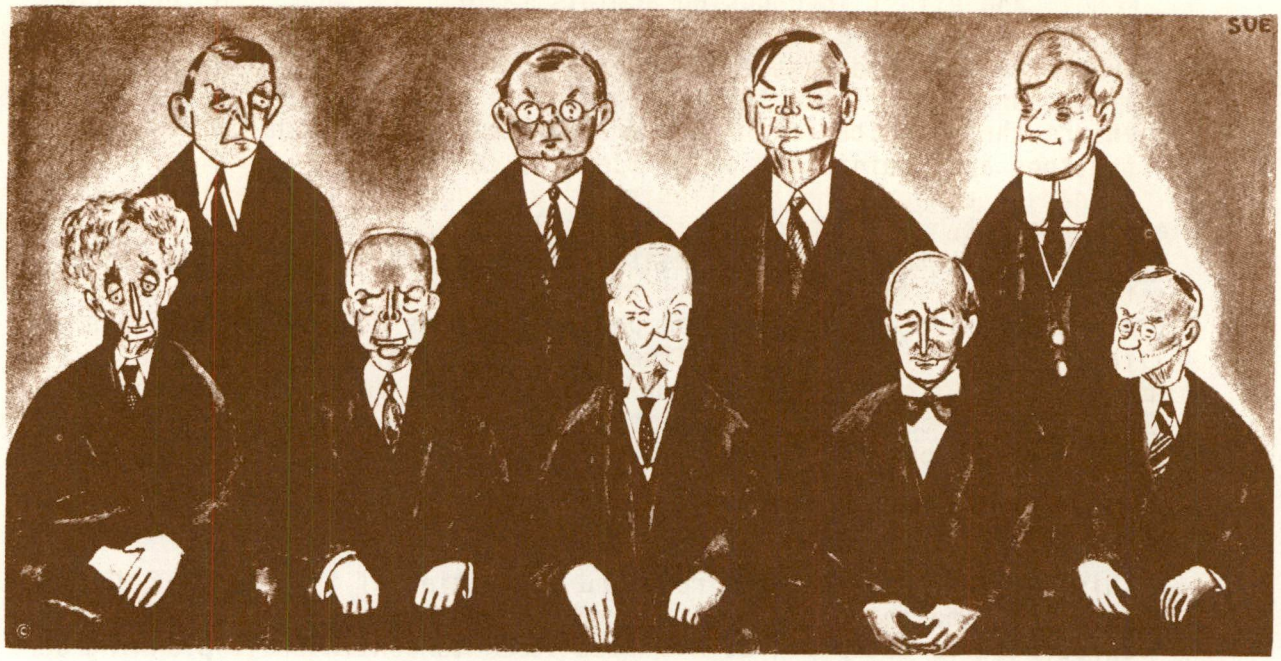
A detailed and well-written pamphlet on boards dealing with governmental functions. It goes over the boards and administrators role in bud-

Lutheran Board of Parish Education. Planning for Lutheran High Schools, Board of Directors Handbook, Part One — Organization and Guidelines. Part Two—Ad Hoc Committees. H04 School Department, Board of Parish Education, 3558 South Jefferson, St. Louis MO, 21 pp., 1978.
Department, Board of Parish Education, 3558 South Jefferson, St. Louis, MO 63118, 21 pp., 1978.

This booklet describes the role and activities of the board of directors prior to the opening of a new Lutheran high school. The board is encouraged to establish ad hoc committees to continue all planning activities initiated by the steering committee in the areas of organization, enrollment, financing, site development, and instruction. This handbook contains a job description of each ad hoc committee's responsibilities, a sequential list of major activities, suggestions for involving people, communications ideas and procedures, and references to other available materials. Also defined is the interrelationship between the board of directors and the church structure.

Mace, Myles L. Directors: Myth and Reality. Division of Research, Graduate School of Business and Administration, Harvard University, Boston, MA, 1971.





National Association of Independent Schools. Evaluating Our Performance: An Advisory for Boards of Trustees and School Heads. National Association of Independant Schools, 4 Liberty Square, Boston MA, 73 pp., 1978.

Boards of trustees and heads of private elementary and secondary schools need to engage in some form of annual evaluation as a means of achieving greater administrators and governing boards, according to the authors. This paper briefly explores the philosophical ramifications of evaluation and outlines practical suggestions for carrying out an evaluation process, including self-evaluation of the head administrator by the board, and timing considerations. Descriptions of nine evaluation processes in effect in various private schools are appended.

National Council of Young Men's Christian Association. Training Volunteer Leaders: A Handbook to Train Volunteers and Other Leaders of Program Groups. National Council of Young Men's Christian Associations, New York, NY, 1974.

This manual provides a comprehensive training program for leaders of small groups. The training sequences and topics include: establishing a climate for learning; self-diagnosis of learning needs; defining training objectives; designing a training unit; and evaluation and re-diagnosis. Several exercises are given that relate to specific competencies.

National Jewish Welfare Board. Building Board Leadership for the Years Ahead: Proceedings of the Advanced Leadership Training Institute. September Board, 15 East 26th Street, New York, NY 10010.

Of the presentations reprinted here, two are of special relevance: Harry A. Schatz, "Policy and Administration in the Jewish Community Center: Defining Leadership Roles for Effective Operation," and Sue W. Spencer, "Developing Effective Board and Committee Organization and Functioning."

_____. Rabinowitz, Benjamin. Board of Directors, Committees, and their Responsibilities: A Manual for Board Member Institutes. New York, NY.

Material for study on board-related matters.

Sorter, Bruce; Allen, Larry; and Davidowitz, Laurie. Council Effectiveness Training. The Cooperative Extension Service, University of Maryland, College Park, MD, 1980.
This training guidebook which is accompanied by A Participant Workbook provides information and materials to conduct a training program designed to enhance the functioning of community advisory councils. The content uses a program planning simulation that integrates communication, leadership, group process skills, decision-making and trust building into the task of developing a community education program.

United Community Funds and Councils of America. Trecker, Harleigh. Social Agency Board Member Institutes: An Analysis of the Experience of Eighteen Cities: A Research Project. Advisory Committee on Citizen Participation, New York, NY, 36 pp., 1952.
This systematic review of eighteen board member institutes can be very useful to any agency that is planning its own institute, especially the first one.

University of Missouri Extension. Organizational Development: A Guide to Training Boards and Staff of Organizations and Agencies. University of Missouri Extension Division (no date given).
A training manual covering the following topics: board and staff responsibilities, program development, utilizing volunteers and group dynamics. Exercises and transparencies are included.

Wallen, John L. Charting the Decision-Making Structure of an Organization. Northwest Regional Educational Laboratory, 710 S.W. Second Avenue, Portland, OR 97204, 19 pp., May 1970.
The type of influence exercised on decision-making by a position in an organization may vary from decision to decision. The position may simply be free to make recommendations or need to be informed of decisions to implement them. On the other hand, the position may influence the decision, be able to veto it, or authorize and issue a directive to carry it out. These types of influence can be coded and recorded on a decision-making chart. These charts cannot be imposed successfully on an organization by command. They should be developed by the people who work together. The manager should work with the immediate subordinates to decide the area of decision-making to be charted; determine the key decisions to be made; identify the organizational positions participating in each decision-making process; decide in which of five identified ways (recommending, approving, authorizing, being informed, or being consulted) each position participates; and record agreements on the chart. The discussion necessary to construct the chart points up and helps to resolve problems. Charting the resulting agreement shows people how they participate in the decision-making structure of the organization.

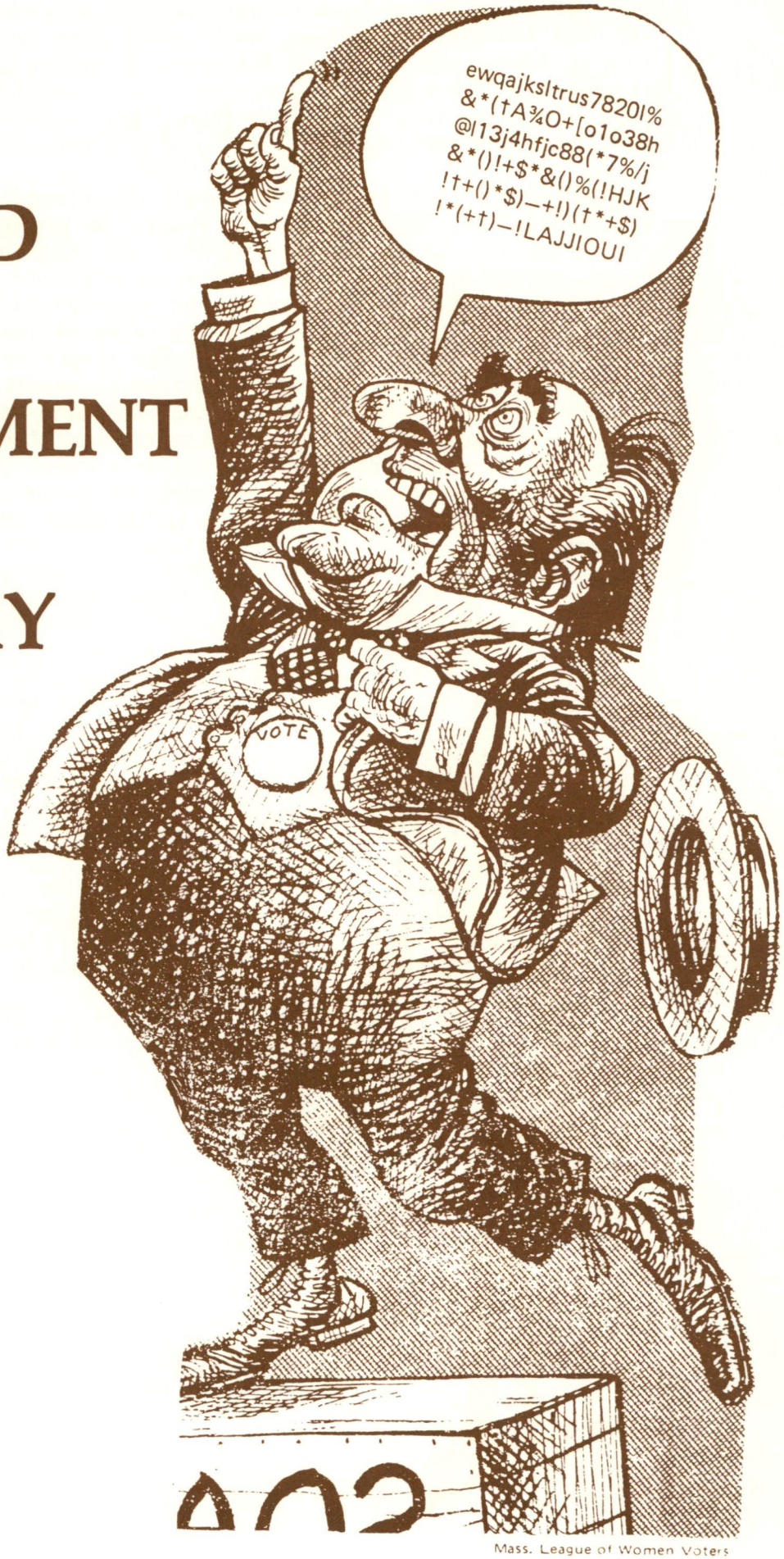
Wynn, Richard and Guerrieri, Donald J. Manual for the Self-Evaluation of School Boards. Tri-State Area School Study Council, 5R29 Forbes Quadrangle, University of Pittsburgh, 230 South Bouquet Street, Pittsburgh, PA 15260, 48 pp., 1978.
Developed for use with 90 school systems in western Pennsylvania, this manual was field-tested and modified in some of those systems. It allows school board members to test themselves on six important aspects of school board operation: 1) the conduct of meetings, 2) relationship with the administrative staff, 3) educational program improvement, 4) personnel function, 5) school funds and facilities, and 6) school-community relations. Each section includes a number of criteria against

which the board's performance may be evaluated. It is suggested that after each board member and the superintendent complete each section of the evaluation form, working sessions be scheduled to discuss the criteria and to search for means of making improvements where necessary. Making these improvements may call for workshops, outside consultants, task force committees, and further evaluation procedures. A six-page bibliography dealing with school board operation is included.

Boardmanship (For School Directors). Washington State School Directors Association, 200 East Union, Olympia, WA 98501, 94 pp., November 1975. This booklet is intended to help new school board members in the state of Washington learn their jobs rapidly and, at the same time, to serve as a constructive reference for experienced board members. Individual chapters focus in turn on an overview of the school board, the school board member as an individual, the structure of Washington's public school system, school board meetings, establishing policy, school board-superintendent relations, personnel functions of the board, understanding school finance, school operation, the Washington school board's association, and a code of ethics for board members. Because the booklet is aimed specifically at school board members in the state of Washington, its value will be somewhat limited for board members in other states.



4 BOARD DEVELOPMENT THEORY



Mass. League of Women Voters

A. Books

Davies, Don and others. Sharing the Power? A Report on the Status of School Councils in the 1970s. Institute for Responsible Education, Boston, MA, 87 pp., 1977.

An examination of the authority, the structure, and the activities of school councils, as revealed through relevant literature, field visits, workshops, interviews, and other channels open to the Institute for Responsive Education, reveals that most councils have little responsibility or power to affect educational decision-making, and rarely are given the opportunity to use such power when they do have it. The gap between what is expected from councils and what they actually achieve is due largely to "environmental forces" in the councils' relations with such groups as principles, school boards, and traditional parent groups, many of which are reluctant to share power. Still, councils have the potential to contribute greatly to education if they receive support in six areas: 1) authority must be decentralized so that councils can participate effectively at the building level; 2) councils must have adequate resources; 3) educators must have access to opportunities to improve their skills at working with parents and councils; 4) councils and other agencies must be encouraged in the coordination of their efforts; 5) councils should represent all aspects of the educational community, preferably by election; and 6) council activities should be well-documented and carefully evaluated yearly.

Greenleaf, Robert K. Trustees as Servants. Center for Applied Studies, 17 Dunster Street, Cambridge, MA 02138, 1974.

Greenleaf has some interesting ideas about the possibilities of trusteeship. For example, he thinks that the balance of responsibility for management ought to shift from staffs to boards, and that boards ought to have a "board coach" to help members do a better job.

Hartogs, Nellie; Weber, Joe. Boards of Directors: A Study of Current Practices in Board Management and Board Operations in Voluntary Hospitals, Health and Welfare Organizations. Oceana Publications, Dobbs Ferry, NY 10522, 1974.

This is the Greater New York Fund's very detailed study of responses to questionnaires. Gives useful insights into service organizations, particularly in health and welfare. Although much of the information is mundane, it is helpful in understanding board expectations of staff and staff expectations of boards.

Hunter, Floyd. Community Power Structure: A Study of Decision Makers. University of North Carolina Press, Chapel Hill, NC, 1953.

A study of power structure and leadership in an American city. This book describes the strata of society from which much of board membership is drawn and is, therefore, of interest to anyone working closely with boards.

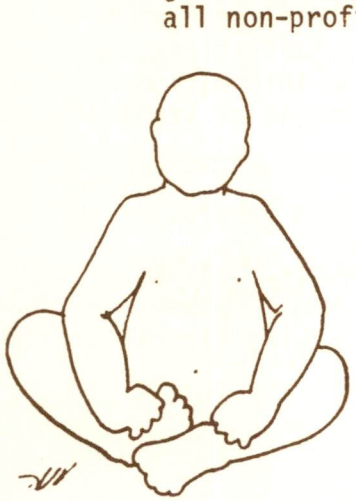
Johns, Ray. Executive Responsibility. Association Press, New York, NY, 1954.
This book can be very useful reading for the board member or president who wants to understand the demands and pressures that operate on the executive. Chapter 6 gives a picture of the board from the executive's point of view.

Koontz, Harold. The Board of Directors and Effective Management. McGraw-Hill, New York, NY, 1967.
This is one of the basic texts in the field; from the point of view of effective management it covers all the major topics.

King, Clarence. Organizing for Community Action. Harper, New York, NY, 1948.

Mayer, Frank H. The Development of Policy by Local Boards of Education: A Review of the Literature. 40 pp., May 1980.
This paper examines the policy-making function of the board of education as it is viewed in the educational literature. It begins by looking at several definitions of policy and suggests that policy is a statement of expressed philosophy, value orientation and general direction. It examines the question of why written policies are necessary and does so in terms of such issues as accountability, the value of the policy-making process, and the promotion of efficiency. A historical perspective on the development of educational policy is offered. The author examines several models of policy-making, including the traditional model (characterized by a slow sequence of incremental changes) and alternative models (an open participation of diverse groups, a research-based qualitative approach, a dynamic response to environmental influences on an open systems theory). The author concludes that two views of the school underlie policy-making. One sees the school as a service organization in which professionals hold the key to policy development and the other stresses participatory democratic policies. He notes that the group that defines the possible solutions to the problem is the group on top in the power struggle.

Nason, John W. The Future of Trusteeship: The Role and Responsibilities of College and University Boards. Association of Governing Boards of Universities and Colleges, 1 Dupont Circle, Suite 720, Washington, DC 20035, 1974.
A comprehensive study of the changing role of trustees in higher education. Though he focusses on colleges and universities, Nason's insights into the roles trustees can play and some of his specific suggestions about future trusteeships should be of interest to leaders of all non-profit organizations.







Smith, Nick L. The Role of School Boards in School Self-Study Evaluations. Final Report Submitted to the National Study of School Evaluation. Northwest Regional Educational Lab., Portland, OR, 101 pp., August 1978.
School board members, district superintendents, and building principals in 170 districts in 16 western states were surveyed to determine the role of school boards in school self-study evaluations. Analysis of the questionnaires resulted in the following conclusions: 1) board members seldom assisted in the evaluation process, especially in larger districts; 2) school administrators more often perceived a higher level of board involvement and better evaluation procedures than did board members; 3) both administrators and board members rated the procedures more highly than the final recommendations and felt the recommendations would not be very useful for board decision-making; 4) the main reasons for lack of greater board involvement included lack of time, uncertainty about their roles, and the belief that they were not needed; 5) both administrators and board members ascribed lack of initiative and interest to the other group; 6) some support existed for greater board involvement, especially in reviewing administrative and policy-making activities, preliminary evaluation recommendations, and school philosophy; 7) self-instructional materials and in-service training were thought to be beneficial, and should be provided by accrediting agencies, state school board associations, or state departments of education. (The questionnaire is appended.)

Stanton, Jim and Others. Resource Guide and Bibliography on School Councils. Institute for Responsive Education, Boston, MA, 104 pp., 1978.
While membership in school councils is estimated at 1,200,000, mostly as a result of regulations connected with federal programs, the actual effectivenss of school councils remains low. Administrators, school boards, and parent organizations often look on councils with suspicion and withhold needed support. To be effective councils need access to three categories of resources: empowerment resources (budget, staff and communications capability), development resources (help in utilizing skill development and information sharing), and information resources for taking action on school-related issues. This document discusses the nature of these needs and provides an annotated listing of materials and organizations that can be of assistance in understanding and obtaining the resources required.

Trecker, Harleigh. New Understanding of Administration. Association Press, New York, NY, 1961.
This useful manual for executives can also serve to help the interested board member to understand his agency, the community, his own role, and of course the difficult job of the executive. Chapter 8 provides a point-by-point review of board and committee management from the perspective of the executive.

_____. Social Agency Boards--An Exploratory Study. School of Social Work, University of Connecticut, Storrs, CT, 1958.

Zald, Mayer N., ed. Power in Organization: Proceedings of the First Vanderbilt Sociology Conference, 1969. Nashville: Vanderbilt University Press, 1970.
An explanation of organizational functioning with some relevant sections on Boards as instruments of power.

B. Papers and Journal Articles



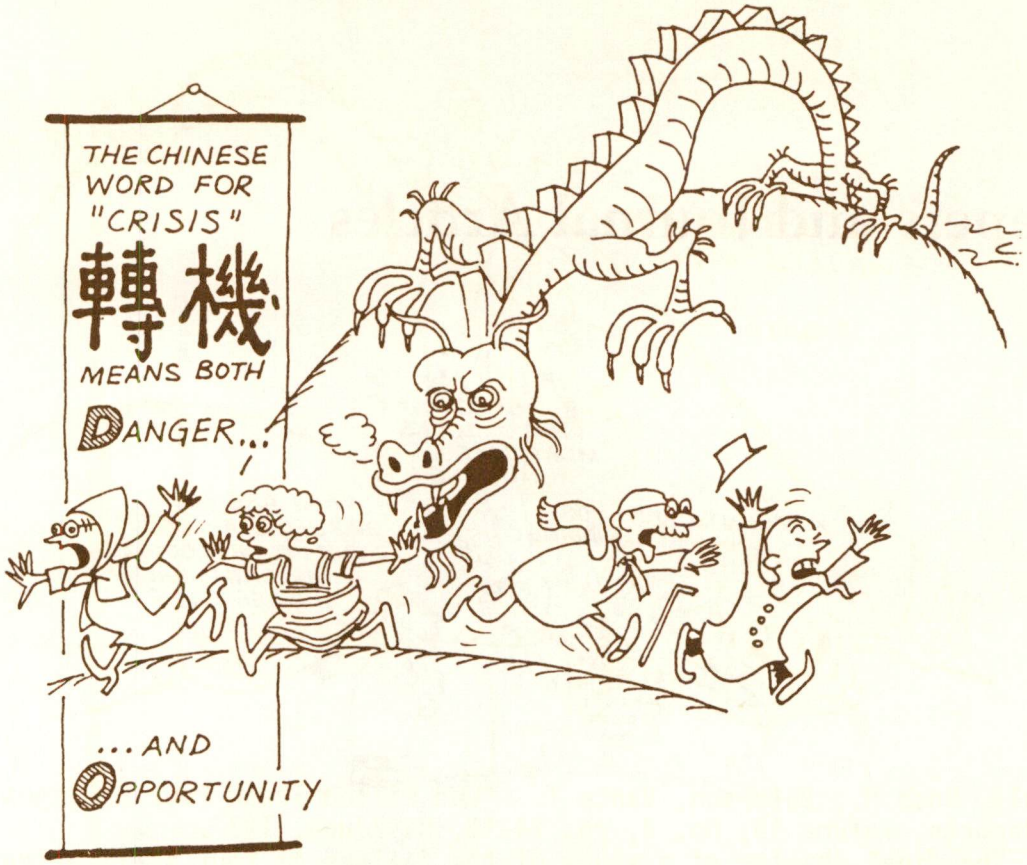
Auerbach, Arnold J. "Aspirations of Power, People, and Agency Goals." Social Work, Vol. VI, No. 1, pp. 66-73, January 1961.
A frank and interesting discussion of the fact that board members often are attracted to community activity by "the element of recognition, prestige, and power," and of the related fact that social workers, who avoid moralizing about their clients, often cannot accept this motivation in members of the board.

Burke, Edmund M. "The Search for Authority in Planning." Social Service Review, Vol. XLI, No. 3, pp. 250-260, September 1967.
"Without authority, is planning merely an exercise in frustrations?" The author reviews some of the high-points in the history of social planning, arranging them under the headings: Community Power, Redistribution of Power, Expertise, Legal Sanction, and Management Science. He then provides an excellent, brief introduction both to the theory and practice of planning.

Blanchard, Paul D. "Most School Board Members Are Their Own Men (and Women)--Not Conduits of the Public Will." American School Board Journal, Vol. 161, No. 5, pp. 47-48, May 1974.
In discharging assigned duties, a board member who regards himself as a "delegate" tends to represent constituent views. A "trustee" tends to rely more on personal convictions.

Coulson, Robert. "The Black Voice and the Board Member." Child Welfare, Vol. XLVIII, No. 8, pp. 456-458, October 1969.
An experienced arbitrator comments on potential conflicts on an integrated board; interesting examples and sound advice.

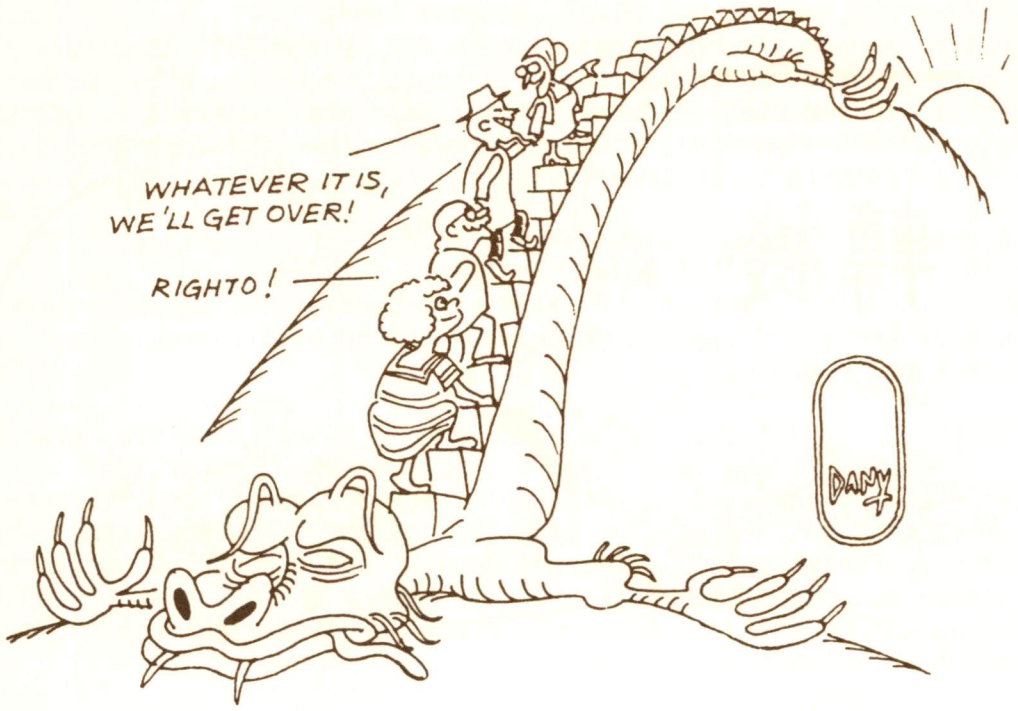
Edmonds, E.L. "The School Board of Tomorrow. A Position Paper." Paper presented at the International Congress on Education (2nd, Vancouver, British Columbia, June 17-20, 1979).



With reference to Prince Edward Island, Canada, the author notes that a new school act for that province in 1971 consolidated 217 school districts into 5. The result has been a decline in community participation with corresponding alientation and apathy manifested by the public in two ways: a dearth of candidates offering themselves for election to the new school boards and a very low turnout in voting. To solve these problems, the author makes recommendations for 1) a graduated scale of payment for services to school trustees; 2) more extensive use of the principle and practice of cooperation; 3) compulsory voting by the public during school board elections; and 4) establishment of certain criteria of eligibility to sit on school boards, including attendance at pre-service courses. The author also suggests the introduction of units of work on school boards into the curriculum of schools and concludes by suggesting some new rules for school boards.

Glover, Elizabeth E. "Social Welfare Administration: A Social Work Method." Child Welfare, Vol. XLIV, No. 8, pp. 431-467, October 1965.
This article is interesting in two ways. First Dr. Glover provides a theoretical review, looking at the definition of "administrator" in sociology, business administration, and finally in social work. Then she analyzes the results of a small study of "administration as a method of social work, with particular attention to its use in relationship with agency boards, in what are identified as crisis situations."

Grossfield, Jerry. "Future Jewish Family Agency Boards--Sectarian or Non-Sectarian?" Journal of Jewish Communal Service, Volume XLVII, No. 2, Winter, 1970.
The question of community and consumer representation on the Board is here discussed from the novel point of view of self-affirmation.



Healy, Rose M.; Peterson, Vance T. "Who Killed These Four Colleges?" AGB Reports, Volume 19, No. 3, pp. 14-18, May/June, 1977.
The final chapter of a study of the failure of four small private colleges implicates their trustees. Trustees were found to have had inadequate participation in planning and operational realities, the consequence in part, of a lack of critical information.

Hersey, Paul; Blanchard, Kenneth H. "So You Want to Know Your Leadership Style?" Training and Development Journal, Volume 35, No. 6, June 1981.
A self-assessment which allows the reader to measure his/her leadership style. The Leader Adaptability and Style Inventory (LASI) consists of hypothetical situations and multiple alternative actions from which to choose. Four basic leader behavior styles are listed and explained.

Hilkert, Robert N. "The Board Member--Opportunity for Service." Child Welfare, Volume XLIV, No. 3 pp. 156-163, March 1965.
A thoughtful essay on the responsibilities and privileges of Board Members, the Board President, the Executive, and the Staff.

Ingram, Richard T. "Trustees--Power and Sanity in the 1980s." Educational Record, Volume 61, No. 1, Winter 1980.
The role of college lay governing boards in the 1980s is addressed. Focus is on trustees' responsibilities with respect to litigation, government regulation, private gifts and tax reform, academic tenure, faculty unions, interinstitutional cooperation, deferred maintenance of college buildings, accreditation, and public image.

Kahle, Joseph H. "Assessing Executive Performance." Social Casework, Volume LII, No. 2, pp. 79-85, February 1971.
This paper advocates an official and open evaluation by the Board of Executive's effectiveness. The suggested process of evaluation--which involves the Staff--is described in detail and a sample outline for a written evaluation is appended.

_____. "Structuring and Administering a Voluntary Agency." Social

Work, Volume XIV, No. 4, pp. 21-28, October 1969.
The author argues strongly against both the "pyramidal" structure of authority and the "collegial" one. Instead, he advocates a "pyramidal-collegial" system that reeducates the traditional supervisor to assume administrative responsibilities and provides the less experienced social case worker with an opportunity to develop an identity.

Korman, Richard. "Primary Sources on Public Advisory Committees." RQ, Volume 19, No. 2, pp. 121-126, Winter 1979.
Provides the first part of a listing of congressional documentation on the use of public advisory committees; primary bibliographic tools and congressional hearings.

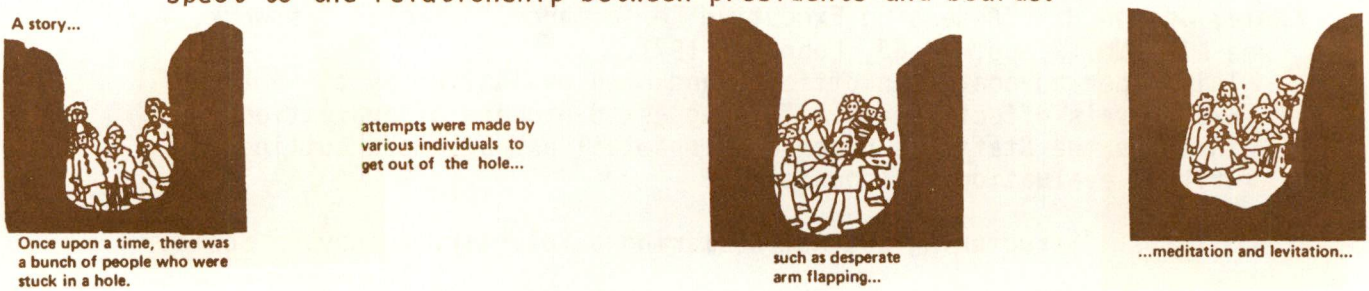
Kramer, Ralph M. "Ideology, Status and Power in Board-Executive Relations." Social Work, Volume X, No. 4, pp. 107-115, October 1965.
A theoretically oriented examination of the functional and disfunctional factors that affect the stability of the voluntary agency which "manages to function in the face of apparent welfare value conflicts and status and power disparities on its policy making 'team'." An interesting introduction to the sociological problems inherent in Board-Executive relations.

Levin, Herman. "Some Positive Thoughts on Administration." Child Welfare, Volume XLII, No. 8, pp. 378-384, October 1963.
Some incisive arguments against the concept of the administrator as "enabler," the alternative role of the "integrator" is put forth and illustrated from Dr. Levin's own experience as an administrator.

Lieberman, Myron. "Where Boards Control Schools, Where They Don't--And Why." American School Board Journal, Volume 164, No. 4, pp. 36-37, April 1977.
As the size of the district increases, the control exercised by the board decreases for external and internal reasons.

Lutz, Frank W. "Local School Board Decision-Making: A Political-Anthropological Analysis." Education and Urban Society, Volume 12, Number 4, pp. 452-465, August 1980.
Focuses on school boards as sociocultural systems. Asserts that boards' decision-making processes operate within a cultural context and have, over the centuries of their existence, developed a culture of their own. Proposes that culture dictates a decision-making output that is not as responsive or immediate as would be expected.

MacAllister, P.E., and Others. "Expectations, Small and Great." AGB Reports, Volume 22, No. 1, pp. 48-50, January-February 1980.
The role of trustees on college governing boards is addressed. A board chairman expresses the opinion that to elect trustees solely for their ability to contribute money is insulting, and two presidents spell out more detailed criteria for optimum trusteeship, particularly with respect to the relationship between presidents and boards.



Martin, Harold C. "The Academic Program: A Legitimate Board Concern." AGB Reports, Volume 19, No. 4, pp. 33-37, July/August 1977.
Trustees have the responsibility of helping clarify and develop the educational program and also of making sure academic employment policies are equitable and sensible.

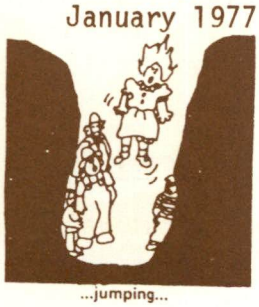
McQuay, Paul L.; Watters, Edmond A. "Advisory Councils: Role, Function, Status, Responsibility and Operations. Position Paper." Williamsport Area Community College, PA, 10 pp., November 1980.
After defining trade advisory committees as groups of individuals who have been selected because of their special knowledge and expertise to give advice on education programs, this report identifies the functions of the advisory committee in the areas of educational objectives, instructional content, program evaluation, review of equipment and facilities, government and private funding sources, staffing, trend forecasting, and community-school relations. The next section of the report describes the structure of advisory committees designed for implementation at Williamsport Area Community College. It provides suggestions on naming the group, determining its size and membership, organizing large committees and subgroups, determining length of appointment, and chairperson selection. Further guidelines are presented for scheduling meetings, providing advance notice of meetings, insuring regular attendance, calling meetings, establishing quorum, and covering expenditures. Finally, several issues related to planning are covered. First, the importance of maintaining a cross-section of the industry in the committee is underscored, especially in terms of sex, race, age, residence, and background. Second, ways in which an institution can recognize the participation and achievements of the group are listed, and third, a number of topics for discussion are suggested.

Milton, Daryl G. "Utilizing the Board of Trustees: A Unique Structural Design." Child Welfare, Volume 53, No. 6, pp. 345-351, June 1974.
This paper describes a matrix-type board committee structure specifically designed to tap the talents of board members and promote their committed involvement.

Montgomery, Helen B. "Practice of Administration: The Role of the Executive." Child Welfare, Volume XLI, No. 2, pp. 51-58, February 1962.
A good summary of the skills a social welfare administrator needs to develop.

Nordstrom, Clayton E. "Unique Challenges of Institution Administration." Child Welfare, Volume XLV, No. 3, pp. 151-157, March 1966.
This article is written very much from the Executive's point of view, the Board being regarded as a potential source of interference with the smooth professional operation of the agency.

Nyquist, Ewold B. "Public Involvement. An Educational Partnership Among Parents, Students, Professionals and Citizens of New York State School Districts." New York State Education Department, Albany, NY, 13 pp., January 1977.



...jumping...

This went on for hundreds of years, until they had tried everything except helping each other out...



so they helped each other out.

In this paper, boards of education are urged to evaluate their policies and their performance in relation to parent and citizen involvement and to consider seriously how programs at districtwide and school levels can be improved. The emphasis in such programs should be on developing open two-way communications and full participation aimed at maximizing the capabilities of the schools to know and act upon the wants and needs of their students and communities. Suggestions for Boards of Education include: 1) aid and support to parents and community volunteers who wish to share in the educational process; 2) steps to work effectively with any community group that indicates a willingness to support programs designed to improve education; 3) need to establish new groups or assign other responsibilities for existing groups to aid in developing policies, programs, plans, and budgets responsive to student and community needs; 4) acknowledgement of the contributions that students themselves can make to teaching, planning, and policy-making; and 5) establishment of an advisory council at each school level with defined decision-making authority in such selected areas as curriculum, budgeting, resource allocation, reporting and evaluation.

Olsen, Peter C. "Commitment Responsiveness of School Board Members." 13 pp., 1980.

This study examined whether school board members give highest priority to representing their constituencies or to voting their consciences. It also looked for correlations between demographic characteristics and the way school board members respond to constituent interests. Data were gathered by a questionnaire submitted to the population of 110 school board members in Rutland County, Vermont, in 1979. A Q-sort was administered reflecting the continuum of attitudes from most responsive to constituents to least responsive. Findings showed no overwhelming preference for either end of the role continuum. There was some indication that respondents preferred statements reflecting a desire to remain independent in their attitudes, yet willing to listen to constituents. No demographic characteristics (age, sex, educational level or length of time on the school board) appeared to have any significant influence on choice of statements.

Oregon University, Eugene. "Advisory Committees." ERIC Clearinghouse on Educational Management, 5 pp., 1977.

This chapter in "The Best of the Best of ERIC" contains 14 annotations of documents and journal articles on advisory committees, all of which are indexed in the ERIC system. Materials on student and community involvement, planning and utilization of advisory committees, and other topics are annotated.

Peterson, Mary Louise. "Horizon: 2000." AGB Reports, Volume 22, No. 2, pp. 14-17, March-April 1980.

Ten important goals for trustees during the 1980s include: long-range planning; educational diversity; public relations; self-regulation; selection of chief executive officers; role of policy making; fully informed governing boards; facing crises; use of incentives to reach institutional goals; and keeping the individual campus as the decision-making center.

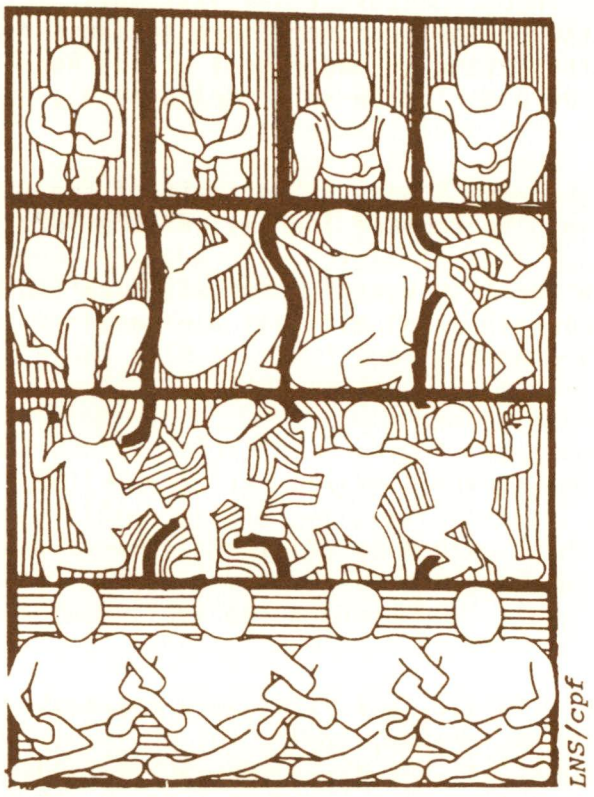
Phillips, Beatrice. "A Director Examines a Director's Role." Social Work, Volume IX, pp. 92-99, October 1964.

A summary of personal experience with a discussion of the Executive's "dual role in middle-management."

Posey, Chester L. "The Things I've Unlearned." AGB Reports, Volume 21, No. 6, pp. 46-48, November-December 1979.
A business executive who is a trustee of a small college describes the world of college management. Three sources of difference between the college and a business are: 1) the absence of profit, 2) the "colleague authority," and 3) the tyranny of entitlements.

Saunders, Harry P. "The Art of Communicating." CEFP Journal, Volume 18, No. 3, pp. 5-7, May-June 1980.
One of the most persistent problems of school facility planners is the need for continuous communication between educators, architects, engineers and construction contractors. Guidelines for effective communication are offered.

Shadgett, John. "The Role of Advisory Committees in School Decision Making. A Synopsis." Paper presented at the Annual Meeting of the American Association of School Administrators (112th, Anaheim, CA, February 15-18, 1980), 16 pp.
This paper discusses a study of two large school districts in Florida to determine their commitment to using local school advisory committees. The survey included the use of two questionnaires sent to 77 elementary, junior high, and high schools. Respondents were asked if they perceived themselves as really making a difference in the decision-making process of several activities listed. Conversely, principals were asked if they perceived advisory personnel as making important decisions in school matters. Results showed that the extent to which citizens participated in the activities was modest, consdering the district's emphasis on citizen involvement. Thus, citizen response showed some ambivalence in participating in decision-making roles.



Sprafkin, Benjamin R. "Impact on Agency Administration of Staff Concern for Social Change." Child Welfare, Volume L, No. 2, pp. 82-85, February 1971.

Increasingly social agency staff members are responsive to changes in society and are willing to assume responsibility for helping to bring them about. Can the social agency administration be responsive to such staff initiative? This article documents some cases including one where the Board was the most responsive part of the administration.

Sykes, Abel B., Jr. "Junior College Boards of Trustees." American Association of Junior Colleges, Washington, DC, 4 pp., June 1970.

Six research reports dealing with the roles and proper relationships between professional administrators and boards of trustees are summarized in this review. The following topics are highlighted: the professional's theoretical basis for operation and its justification, roles and internal and external functions of the board, effects of vague or misunderstood roles, positive influences on role understanding, and the use of teachers and students as sources for policy formulation. A bibliography of published and unpublished materials covering these and related areas is summarized.

Taylor, Raymond G., Jr. "Finding the School Board's Philosophy: A Role Following Model." Education, Volume 101, No. 3, pp. 206-209, Spring 1981.

Discusses a "debate" model using role-playing to develop a workable and compatible educational philosophy in which board members, administrators, and teachers can arrive at a statement of mutual agreement on educational goals, performance standards, and evaluation systems which are related to learning expectations.

Towley, Louis. "The Board Member's Obligation--Agency Standards." Child Welfare, Volume XXXVIU, No. 1, pp. 15-21, January 1957.

In this dissection of the partnership-assumption, the differences and similarities between the "partners" are set down in clear, non-academic language. A strong case is made for a strong Board that--with its varied skills and points of view--will deliberately balance the scrupulous professionalism of a well-trained staff.

Underwood, Kenneth E., and Others. "Portrait of the American School Board Member." American School Board Journal, Volume 167, No. 1, pp. 23-25, January 1980.

Results of a national survey of board of education members includes demographic information and outlines the members' most pressing concerns. Members' concerns are compared with those of the general public expressed in the 1979 Gallup Poll.

Underwood, Kenneth E., and Others. "A Profile of the American School Board Member." American School Board Journal, Volume 165, No. 10, pp. 23-24, October 1978.

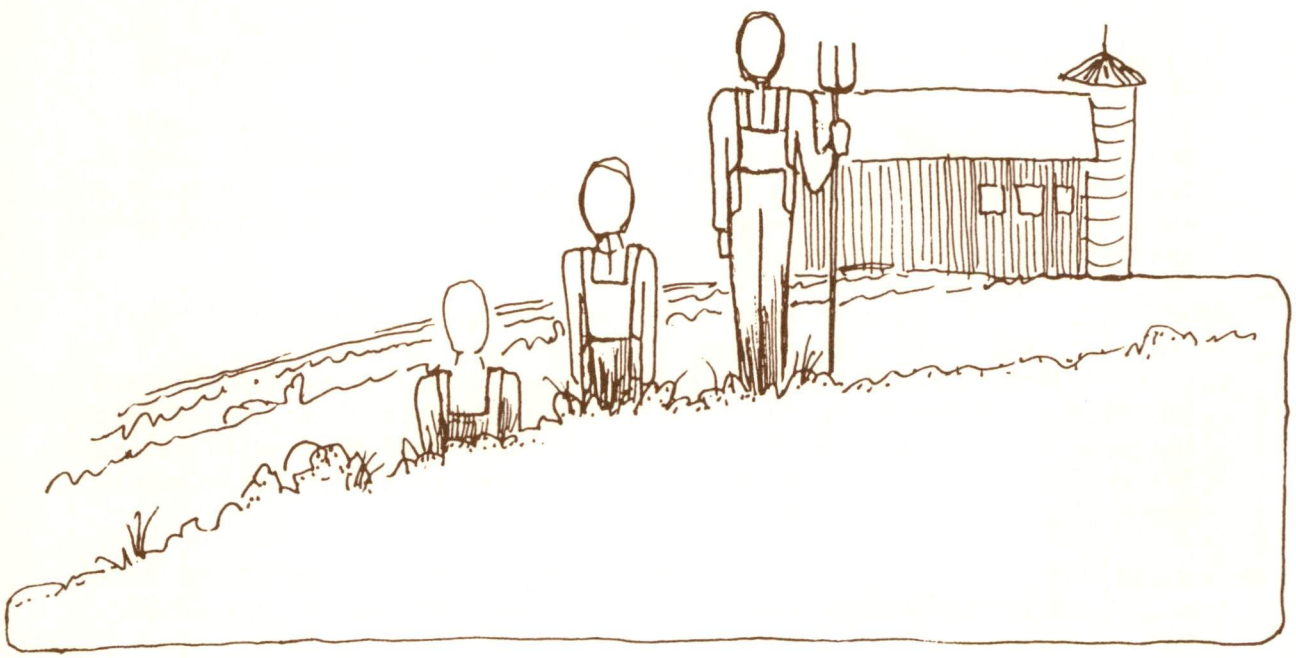
School board members can accurately be labeled as suburban, white, middle or upper-middle class, and middle-aged. School board membership is, however, no longer almost exclusively male; females make up 26 percent of the respondents in the study.

"How Does Your Board Decide? Try Using Some Research Data." Updating School Board Policies. Volume 7, No. 10, pp. 1-5, October 1976.

Data indicate that, for the most part, school boards don't avail themselves of new knowledge when it comes time to set policies.

Vertinsky, Ilan; Barth, Richard T. "A Model of Diffusion and Implementation: An Exploratory Study of Managerial Innovation in Colombia." Socio-Economic Planning Sciences, Volume 6, No. 2, pp. 153-171, April 1972.

Witowsky, Jack. "Education of a School Board Member." Saturday Review, Volume 54, No. 47, pp. 90-92, November 20, 1971.
A member of the Chicago Board of Education describes his experience and suggests reform.





C. Pamphlets and Manuals

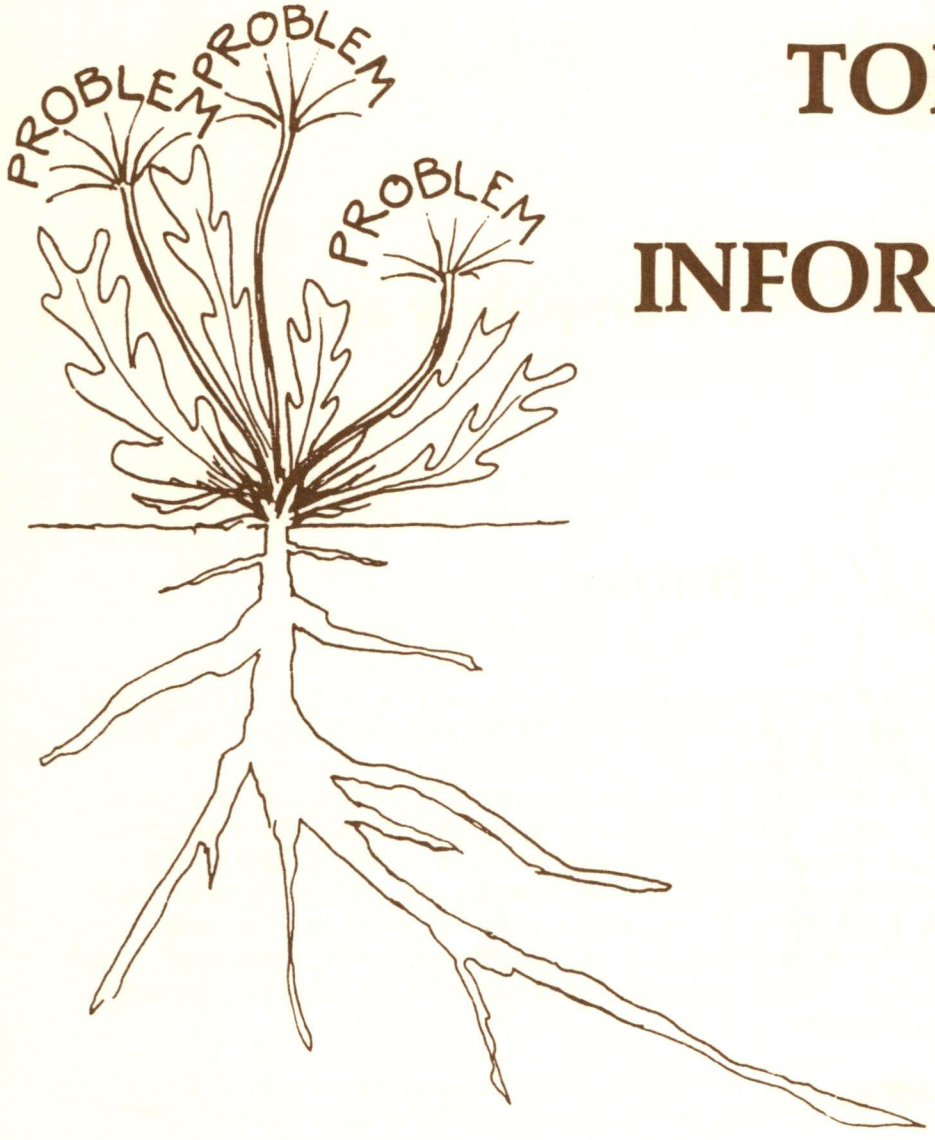
Hertel, Frank J. "Administration Defined." In Florence Hollis, ed., Some Dynamics in Social Agency Administration. New York: Family Service Association of America, 1945.

Administration is defined as a partnership of Board, Executive and Staff. This is an early, unqualified statement of a position that has since been much modified.

Trecker, Harleigh. New Thoughts on Board Function. Child Care Association of Illinois, Chicago, IL, 1969.

5

TOPICAL INFORMATION





"We may as well go home. It's obvious that this meeting isn't going to settle anything."

Drawing by Booth; © 1979 The New Yorker Magazine, Inc.

I. Effective Meetings

A. Books

Biagi, Bob. Working Together; A Manual to Help Groups Work More Effectively. Citizen Involvement Training Program, 225 School of Education, University of Massachusetts, Amherst, MA, 1978.

A do-it-yourself manual for citizen boards and organizations that provides the tools for group development and team-building. It includes 1) a "translation" of group process theories into plain English, 2) suggestions for overcoming communication blocks, 3) information on how to facilitate group meetings, 4) guidelines for observing your own group's process, 5) forms and discussion questions, with responses from other groups, 6) useful ideas and exercises written in simple language, and 7) step-by-step methods.

Dale, Duane; Magnani, David; and Miller, Robin. Beyond Experts: A Guide for Citizen Group Training. Citizen Involvement Training Program, 225 School of Education, University of Massachusetts, Amherst, MA, 1979.

Ours has been called the "age of the experts," but citizen groups may not need to hire expert help. If group members can acquire the needed skills themselves, then there's a chance for increasing self-reliance and effectiveness; the skills don't disappear as they would when a paid expert walks out the door. Therefore, the ability to plan and coordinate training activities is a very valuable type of expertise to have within a citizen group. The first half of this manual helps you develop a picture of the part training can play in your group and the possible roles of a training coordinator/facilitator within the group. Activities help you to build your own theory of how adults learn and explore specific options for citizen group training. Part II takes you through a seven-step sequence for planning and carrying out training activities, including selection of training methods, developing new activities, facilitating different types of learning, and evaluating progress. Exercises and planning guides throughout; annotated bibliography. Also contains a cumulative index of all eight training manuals in the CITP series.

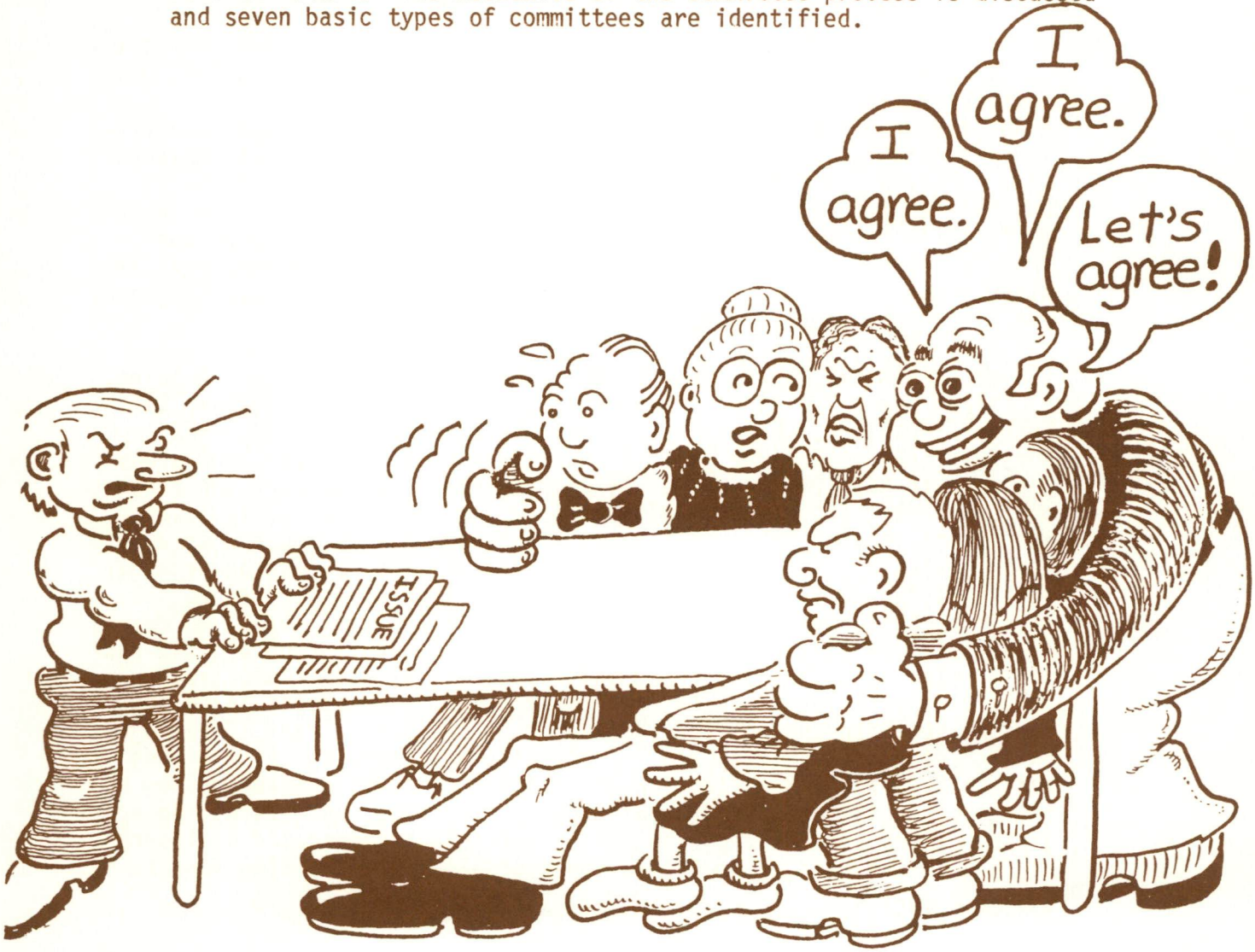
Doyle, Michael and Straus, David. How to Make Meetings Work. Playboy Press, Chicago, IL, 1976.

Carp, Bernard. Your Annual Meeting: How to Make the Most of It. National Publicity Council for Health and Welfare Services, New York, NY, 168 pp., 1955.
A step-by-step guide to annual meetings, large or small.

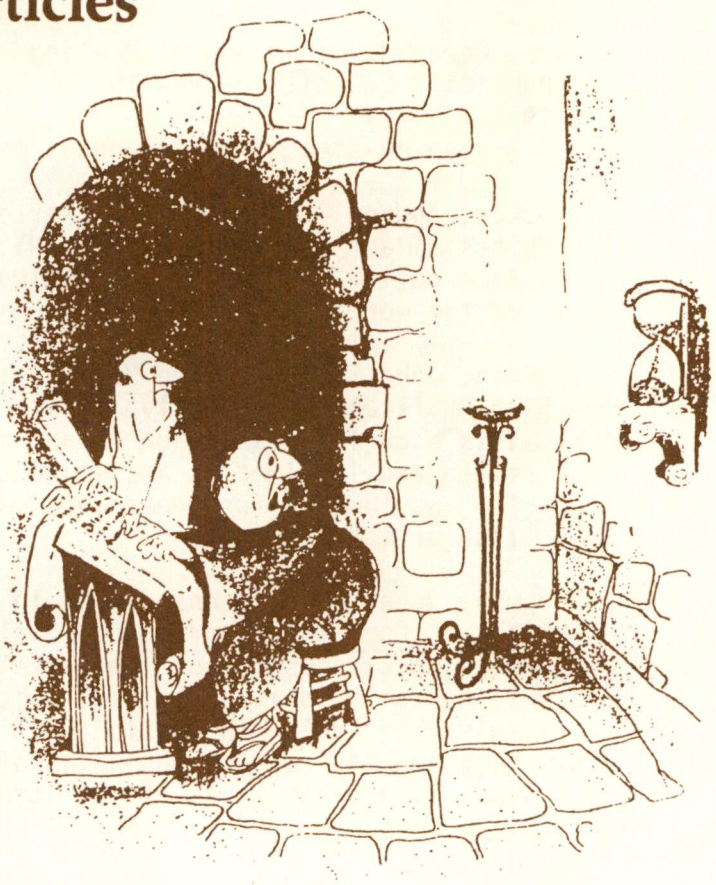
Trecker, Audrey R. and Trecker, Harleigh B. Committee Common Sense. Whiteside and Morrow, New York, NY, 158 pp., 1954.
An excellent and comprehensive guide to all aspects of effective committee work.

Tropman, John E. Effective Meetings: Improving Group Decision-Making. Sage Publications, Beverly Hills, CA, 1980.
This book focuses on boards and committees within the human service field and is aimed at assisting people to make that "one more committee" worthwhile for themselves, and to facilitate the decision making task of the group.

Tropman, John E. and Johnson, Harold R, and Tropman, Elmer J. The Essentials of Committee Management. Nelson-Hall, Chicago, IL, 1979.
This book focuses upon the social and operational nature of committees in general and in detail. The book covers the nature of committee roles, including the basic functions of the chair, officers, other members and staff. The mechanics of the committee process is discussed and seven basic types of committees are identified.



B. Papers and Journal Articles



"My Lord!
Can that thing be right?"

Botch, Ray and Cartwright, Janet. Better Board Meetings in Less Time. Black Hawk College, Moline, IL, 13 pp., 1980.
Based upon the experiences of Black Hawk College (BHC), this two-part report presents guidelines for the effective administration of the meetings of a college's board of trustees. The report first discusses board composition and argues that large boards only complicate and slow down the decision-making process. Specific board responsibilities are then enumerated, and BHC's orientation program for new board members is described. The responsibilities and desirable characteristics of a board's chairperson are then outlined as they relate to conducting meetings and fostering the cooperation of all board members. The report then examines the need for policy statements, regulations, data and documents that can assure consistency in board administration, and concludes with a discussion of the trustee's role. The second section of the report focuses on the methods used at BHC to prepare for and conduct board meetings. Issues to be considered in agenda development are considered first, including the realization that other college groups, such as advisory committees and faculty associations, may be better suited to making decisions in certain areas. The rationale for the monthly meeting schedule of BHC's board is presented prior to an outline of the agenda system, which incorporates a fixed schedule and color coding scheme to facilitate its use. Finally, the report discusses the use of executive and special sessions.

Cutler, Marilyn H. "Not All School Board Meetings Are--Or Need Be--Endless and Fatiguing Affairs." American School Board Journal, Vol. 162, No. 4, pp. 44-46, 49, April 1975.
Offers guidelines for planning and conducting efficient and productive school board meetings.

Greenberg, Lenore. "Using Your Board Meeting as a District Showcase." Journal of Educational Communication, Vol. 4, No. 1, pp. 4-7, Winter 1980.
Suggestions for spotlighting school district people and events are offered as ways of revitalizing school board meetings and capturing the public's attention and interest.

Hogan, Kathleen M. "Keep Public Participation under Control." American School Board Journal, Vol. 168, No. 6, p. 23, June 1981.
Offers guidelines on conducting board meetings efficiently while allowing for public participation.

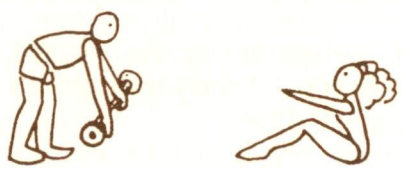
Hon, David. "How to Hold Productive Meetings with Your Peers." Training, Vol. 17, No. 5, pp. 53-54, 56-58, 62-63, May 1980.
Techniques for achieving control of and producing results from task-oriented meetings with peers are discussed, including acquiring a perceived mandate, structuring attendance, and developing a working, narrative agenda. A productivity matrix correlates meeting activities with appropriate group leadership behaviors.

Pademski, Richard S. and Steele, Ruth. "Avoid the Pitfalls of Citizen Committees." American School Board Journal, Vol. 168, No. 4, pp. 40, 42, April 1981.
Examines the problems inherent in working with citizen advisory committees and offers advice to boards and administrators on meeting or preventing conflict with these groups.

Stabile, Robert G. "Put Administrators in Charge of Planning." American School Board Journal, Vol. 168, No. 6, pp. 21-22, June 1981.
Offers guidelines on planning for and conducting smooth, efficient and effective board meetings.

Scharer, Norman B. "Twenty-Three Ways to Use the School Board Meeting for Improved Communication." Thrust for Education Leadership, Vol. 3, No. 1, pp. 26, October 1973.
Article is excerpts from presentations by Superintendent Norman B. Scharer, and special seminars of the National School Public Relations Association.

Wettengel, Winona. "Importance of . . . and Method For . . . Writing Board Minutes. Paper presented at the Annual Oklahoma State School Boards Association Workshop for Presidents and Clerks (2nd, Oklahoma City, OK, March 15-16, 1980), 38 pp, March 1980.
The Oklahoma State Board of Education prepared this handbook to serve as a guide for local board presidents, clerks, and secretaries in recording the minutes of school board meetings. The information that is compiled and presented was gleaned from reference books listed in the bibliography. Chapters of the guide describe board of education meetings, the duties of clerks and secretaries before, during and after meetings), writing the minutes, typing the minutes, and the disposition of permanent minutes. A glossary of terms and samples of materials prepared by clerks and secretaries are attached.





C. Pamphlets and Manuals

Adult Education Association of the USA. Better Boards and Committees--Leadership Pamphlet. Adult Education Association of the USA, 1225 19th Street, NW, Washington, DC 20036.

Adult Education Association of the USA. Streamlining Parliamentary Procedure. Adult Education Association of the U.S.A., 1225 19th Street, NW, Washington, DC 20036, #15.

This good-sized pamphlet explains the rules of parliamentary procedure, when best to apply them, when best to forget them, and offers help in adjusting them to your needs.

Barnard, Douglas P. and Hetzel, Robert W. A Process for Committeeship. 7 pp., 1976.

It is the contention of the authors that most committees are frustrating to their members because of the lack of committeeship skills on the part of administrators. Committeeship skills are the administrative processes, skills, and techniques required to accomplish a desired task. This paper furnishes guidelines for determining whether to form a committee and for ensuring successful committee operations and provides a checklist for administrators to use in assessing their committeeship skills.

French, Larry L. School Board Meeting Management. 14 pp., 1975.
The importance of official school board minutes cannot be overemphasized in these times involving numerous litigable issues and controversies. The sole evidence as to what exactly occurred during a school board meeting is found in such minutes. Accordingly, it is appropriate to provide assistance to the school superintendent or designated administrative official who is responsible for organizing and conducting regular and/or special school board meetings during the course of the fiscal year. Important considerations are the time and place of the meetings, the agenda, the minutes, and the meeting's rules of procedure.

Fry, John P. Committee Leadership: Group Problem-Solving and Conflict Resolution. Paper No. 85. Michigan State University, East Lansing, Learning and Evaluation Service, 102 pp., 1979.
This guide presents suggestions to committee chairpersons for making meetings more effective. The three broad sections of this guide address: 1) preparation of the agenda and physical arrangements for the meeting; 2) management of meetings to avoid negative outcomes; and 3) methods to overcome blocks in conflict resolution and decision making. Examples of frequent problems occurring at committee meetings are illustrated along with several solutions. Appendices include tips on problem solving, identifying constraints before brainstorming for ideas, comparing and ranking ideas, and gaining acceptance for a proposal.

Holleman, J. Thomas, Jr. Meetings of the School Board. 30 pp., 1975.
The basic function of any school board meeting is the transaction of the official business of the school district. Policies that direct the daily activities of the school are derived though this transaction process. If an understanding of the intricacies, actions, and interactions of each group that participates either directly or indirectly in a school board meeting can be grasped by all concerned, then a school board can conduct its business with dispatch and provide the decisive leadership that school districts desperately need. This document provides information on these major aspects of board meetings--the purpose of the meeting, preparation of the agenda, time and place of meetings, rules of order for meetings, executive versus open sessions, dealing with petitions and delegations, minutes of meetings, board committees, and the relationship between administrative staff members and the board.

Lindelow, John. Making Meetings More Effective, ACSA School Management Digest, Series 1, No. 19. Association of California School Administrators, 1575 Old Bayshore Highway, Burlingame, CA 94010, 44 pp., 1980.
At the beginning of the successful meeting process, the meeting leader decides on a leadership style after considering his or her own nature, the needs and desires of group members, and the characteristics of the organization and situation. In planning the meeting, the leader's first guides are the goals and purposes he or she wishes to accomplish. Next, the meeting planner draws up the meeting's agenda. The meeting takes form as the participants are invited, the seating arrangements made, the meeting room arranged, and background information and agendas distributed to participants. When the meeting opens the interpersonal and discussion skills of the chairperson come to the fore. The leader skillfully guides the group through the chaos of problem-solving and

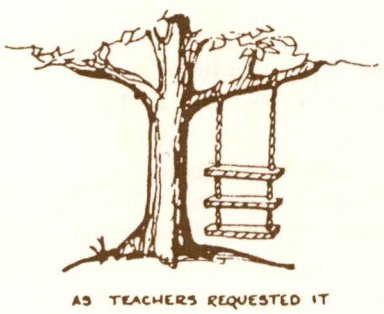
decision-making. At the same time, the leader is alert for the surfacing of negative emotions and maintains the human relations in the group. When decisions are reached, the leader makes sure that responsibilities are clearly designated and deadlines set. After the meeting, the leader distributes the minutes, follows up on the decisions made, and evaluates the meeting's effectiveness. This document describes each of these processes and identifies the sources from which suggestions have been drawn.

Policies for Improving School Board Meetings. National School Boards Association, State National Bank Plaza, Evanston, IL 60201, Cat. No. 70-55, 31 pp., November 1970.

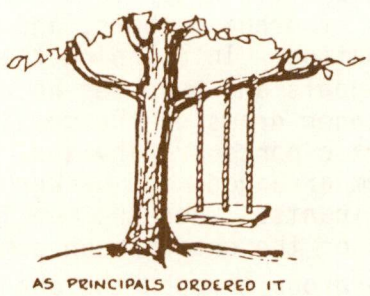
This school board policy development kit, prepared by the Educational Policies Service/NSBA Policy Information Clearinghouse is concerned with the written policies that are necessary to facilitate more effective meeting procedures. In conjunction with a discussion of ways to improve board meetings, a checklist is provided as an instrument for self-evaluation by school boards. Samples are provided for demonstration purposes; these concern the duties of the board president, the board secretary, board parliamentarian, and board members, as well as new board member orientation, school board meetings, board meeting procedures, board meeting preparation, broadcasting and taping of board meetings, review of board procedures, criteria for evaluating board meetings, and agendas. In addition, text of a handout leaflet prepared for the Milwaukee Board of School Directors is given as an example of the kind of welcome a board should extend its visitors. Three publications concerned with school board meetings are recommended, and a brief description is given of each, together with ordering information.

School Board Meetings, Research Report Number 1976-2. National School Boards Association, 1055 Thomas Jefferson Street, N.W., Washington, DC 20007, 33 pp., 1976.

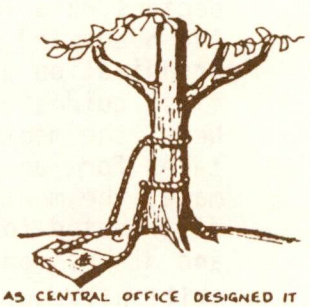
This report first explores the conventional wisdom about what makes an effective school board meeting and then views what has been discovered about how boards actually conduct their business. Where it is clear that conventional wisdom and actual practice do not agree, questions are raised. It is recommended that a school board consciously consider its meeting behavior, thinking about the kind of board it is and the kind it wants to be; think of its goals and priorities and then try to tailor its meeting procedures to meet those goals; review the conventional wisdom, research, and recommendations made by researchers and then judge which practices it should adopt or adapt; and write its meeting procedures in bylaws and policy and follow them until such time as those procedures no longer work.



AS TEACHERS REQUESTED IT



AS PRINCIPALS ORDERED IT



AS CENTRAL OFFICE DESIGNED IT

The School Board President. Guidelines for Better Board Meetings. Pennsylvania School Boards Association, Inc., Harrisburg, PA, 23 pp., December 1972.

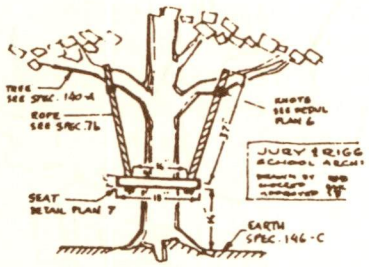
This report contains articles that provide guidelines for running board of education meetings and discusses the roles of superintendents and boards in decision making. The articles discuss 1) the public relations value of well-run board meetings, 2) the importance of following good parliamentary procedure, and 3) the preparation and dissemination of board meeting agendas. The responsibilities of superintendents and boards are also discussed.

Routzahn, Mary Swain. Better Board Meetings: A Manual Based on a Survey of Practices in Forty-Five Social and Health Agencies. New York, NY, 112 pp., 1952.

Material from interviews and questionnaires is used freely to illustrate and enliven this useful guide to successful board meetings.

Sponberg, Harold. The Meeting Will Come to Order: Simplified Guidelines to Parliamentary Procedure. Cooperative Extension Service, Michigan State University, East Lansing, MI (no date given).

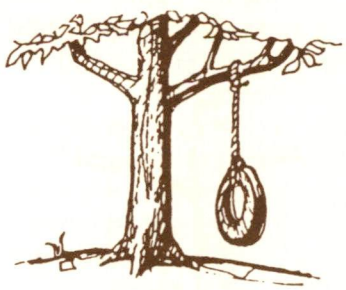
This is a brief guide on basic parliamentary rules for board officers and members.



AS BOARD OF EDUCATION APPROVED IT

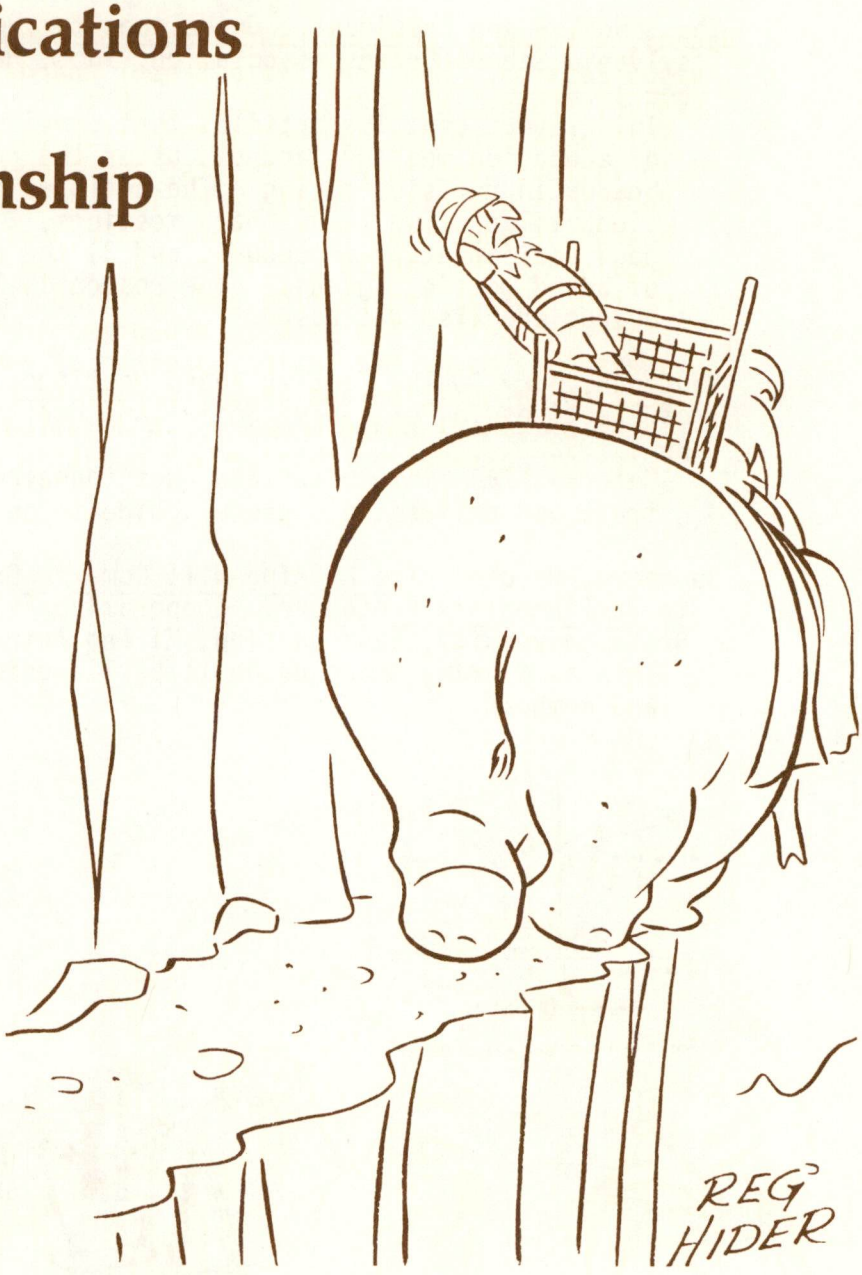


AS MAINTENANCE INSTALLED IT



WHAT THE STUDENTS WANTED

II. Legal Implications of Boardmanship



A. Books

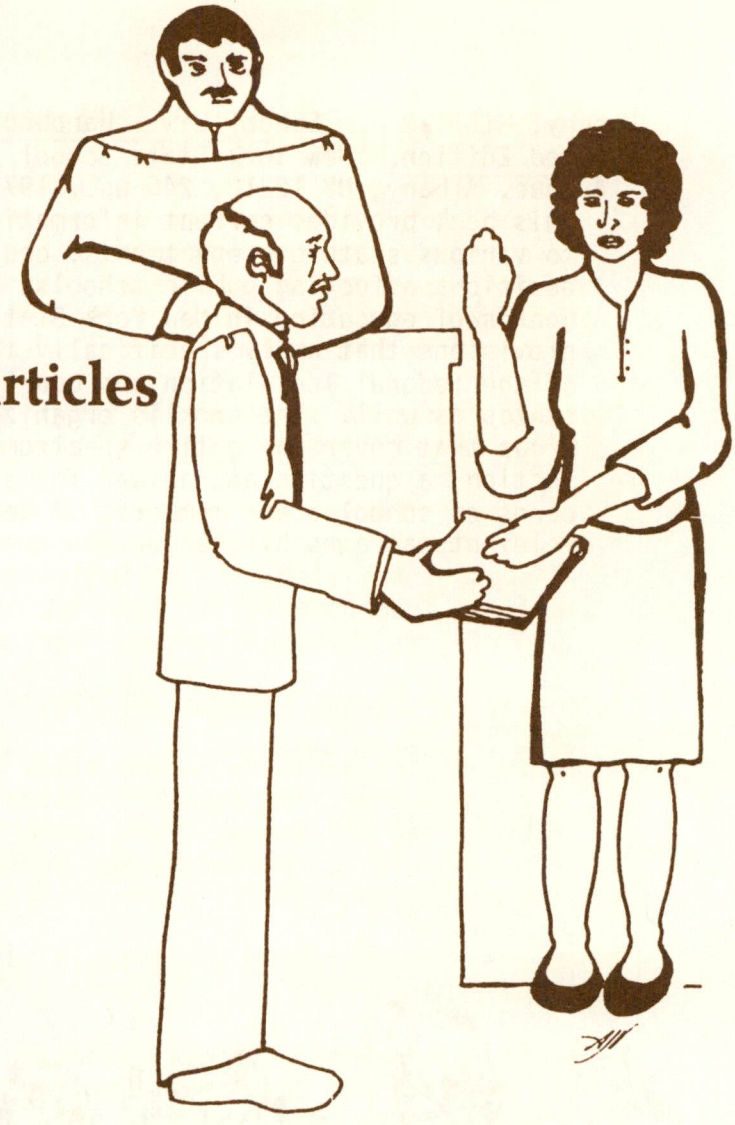
French, Larry L. A Legal Handbook on the Administration and Management of School Districts. University of Oklahoma Law Center, Continuing Legal Education, 300 Timberdell Road, Room 314, Norman, OK 73019, 107 pp., October 1977.

After considering the origins and constraints on school district authority and the legitimate exercise of that authority in carrying out the district's legislative, executive, and quasi-judicial functions, the author presents chapters on school boards, including consideration of open meeting laws and individual board member libility; the school attorney; the school district evaluation system; student-related matters such as admission, jurisdiction, suspension, and corporal punishment; and collective bargaining, including discussion of the management team as an alternative to bargaining. A special supplement discusses Oklahoma Senate Bill 249 on teacher tenure.

Hageny, William J. School Law: Handbook for School Board Members. Revised Edition. New York State School Boards Association, 111 Washington Avenue, Albany, NY 12210, 246 pp., 1974.

This book provides current information on general questions pertaining to various statutory enactments, court decisions, and administrative decisions affecting public schools. Since it is intended for use by boards of education in New York State, heavy emphasis is placed on provisions that apply specifically to New York schools. However, some of the federal legislation and court decisions mentioned apply in other states as well. The book is organized topically into broad subject areas that cover the entire spectrum of public education. Within each section, a question and answer format is used to address specific concerns of school board members. A detailed topical index refers to relevant passages by chapter and question number.





B. Papers and Journal Articles

American School Board Journal. "(A) Advice to Help You Not Get Sued; and (B) What to Do When (A) Doesn't Work." American School Board Journal, Vol. 163, No. 4, pp. 27-33, April 1976.

Blumer, D.H. "Legal Liability of Community College Presidents and Board Members." Paper presented at Forum 6, Annual Convention of the American Association of Community and Junior Colleges (Washington, DC, March 17-19, 1976), 16 pp., March 18, 1976.

This document describes the criminal and legal liability of community college presidents and board members in such areas as contracts, civil rights, and fiduciary responsibilities. Also described are the defenses, which universities ordinarily build to protect their employees from these liabilities. These defenses include the sovereign or charitable immunity provided to some public institutions, the possibility of offering indemnity to convicted college officials, and the provision of insurance coverage to college officials. Suggestions for limiting liability include: an assessment of the risk, the availability of legal counsel trained in college law, and the purchase of whatever insurance is available.

Callaghen, C.T. "CPAs and Nonprofit Directorships." Journal of Accountancy, Vol. 150, No. 26, 1980.
This brief article discusses the assistance that a CPA can provide to a non-profit organization by serving on the board of directors. It also identifies some inherent pitfalls for CPAs. With the presence of a CPA, expectations of fiscal stability and accountability are particularly high. The nature of the CPA's skills and knowledge make him/her especially liable for financial mismanagement.

"Not for Profit Corporation Director: Legal Liabilities and Protection." Federation of Insurance Counsel Quarterly, Vol. 28, No. 57, 1977.

Floyd, Koy. "Facing the Prospect of Redress." NOLPE School Law Journal, Vol. 5, No. 2, pp. 144-152, 1975.
Discusses the liability of individual school board members for board actions that potentially infringe on students' constitutional rights and reviews relevant Supreme Court decisions.

Iannotti, L. "Legal Responsibilities of Trustees." Philanthropy Monthly, June 1978.
This article presents a case study of a suit involving several hospital board members. The issues of mismanagement, non-management and self-dealing are discussed. Some comparisons are made between the directors of non-profit corporations and profit corporations, and suggestions for minimizing liability are provided.

Jacobs, J. "Association Liability." Association and Society Management, February-March 1979.

Leverett, E. Freeman. "Legal Liability of Individual Board Members." Paper presented at the Annual Meeting of the National School Boards Association (40th, San Francisco, CA, April 19-22, 1980), 29 pp., April 1980.
Twenty-five years ago, law suits seeking recovery against the individual resources of school board members were virtually unheard of. Now, personal judgements impacting upon the individual resources of board members are commonplace. The legal developments that have contributed to this rather sudden change of circumstances are explained in this paper. A number of court decisions are summarized that relate to the following issues: the background of personal liability of school board members; the federal doctrine of limited immunity as applied to state officials; the kinds of damages school board members are subject to; and, the kinds of cases where the right to a jury trial is guaranteed, where it is questionable, and where it does not exist. Two recent decisions of the Supreme Court are cited that offer the promise of an extension of absolute immunity to school boards in the exercise of their two most often used powers, legislative and quasijudicial. In addition, two recent decisions are cited that illustrate state laws governing negligence and libel. The final section consists of eight pointers in avoiding personal liability.

McCurley, S. "Liabilities and Responsibilities of Board Members of Non-Profit Corporations." Volunteering, July 1978.
This article provides a brief discussion of the duties and potential liabilities of individuals serving on the board of directors of non-profit corporations. Suggestions that demonstrate "good faith" actions on the part of board members are provided and liability insurance is discussed.

Smith, Michael R. "School Board Liability for Violations of Federal Rights." School Law Bulletin, Vol. 12, No. 1, pp. 1-11, 24, January 1981.

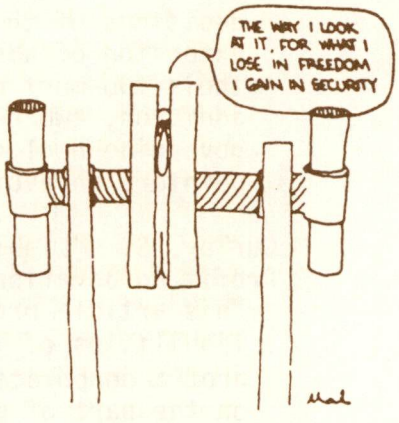
Establishes a four-step analysis to help determine whether a particular violation of federal rights is caused by official policy or custom, thus making the school board liable in suits filed under federal statute 42 U.S.C., Section 1983. Discusses three landmark Supreme Court cases.

Virginia Law Review. "Trustees of Charitable Organizations", Virginia Law Review, Vol. 64, No. 449, 1978.

This article addresses the proper legal standards applicable to the duties of loyalty and care owed by charitable fiduciaries. The article discusses the rapid evolution in modern charity and the shortcomings in the law of charitable organizations. Several case studies are reviewed.

Zelman, William. "Liability for Social Agency Boards." Social Work, pp. 270-274, July 1977.

This article presents an overview of some of the major issues in the area of liability. It examines general rules of conduct for boards of directors, and reviews the doctrine of charitable immunity and predicts its eventual abolishment.





C. Pamphlets and Manuals

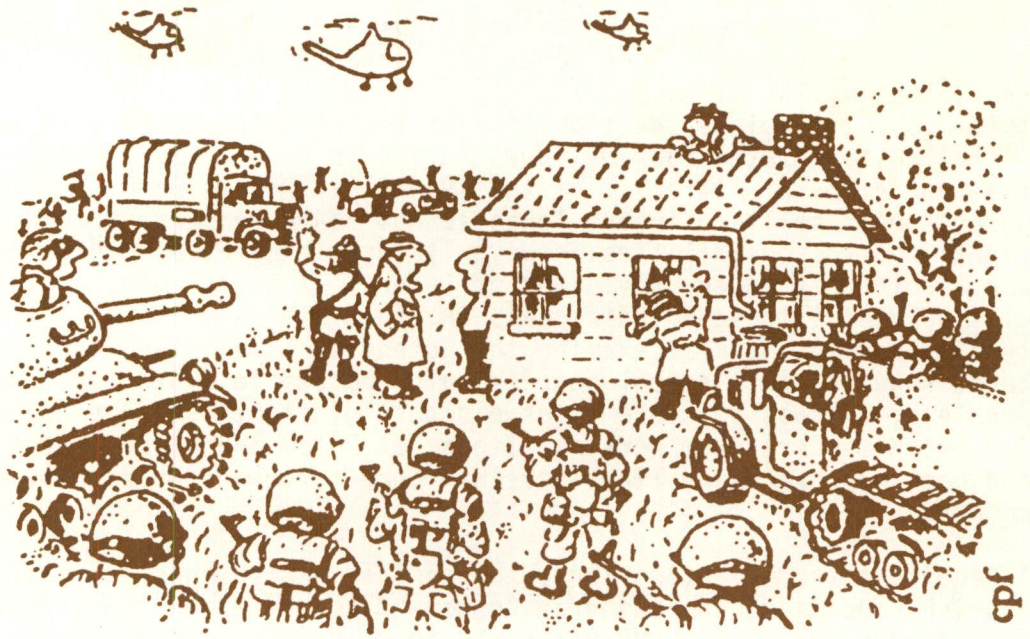
Graham, Russell R. School Board Member Liability. Who Is Liable? Who Is Not Liable? What Can Be Done About It? Texas Association of School Boards, Austin, TX, 21 pp., 1975.

This booklet examines the liability of school board members in light of the United States Supreme Court ruling in Wood v. Strickland and the provisions of Title VII of the 1964 Civil Rights Act. It was prepared specifically to inform Texas school board members of their legal rights and responsibilities; however, since Texas government officials are liable only under provisions of federal law, most of the discussion will be useful to school officials in other states as well. Different sections of the booklet examine the potential liability of board members, suggest how a school board should operate to avoid liability problems, discuss possible steps a school district can take to protect its board members from personal financial loss, and consider the pros and cons of purchasing liability insurance coverage for school board members.

Legal Requirements. Planning for Lutheran Elementary Schools. E06. Board of Parish Education, The Lutheran Church--Missouri Synod, 3558 South Jefferson Avenue, St. Louis, MO 63118, 32 pp., 1978.

Part of a 13-volume series designed to help Lutheran communities assess the feasibility of starting a Lutheran elementary school and to assist ongoing schools in current operation, this volume focuses on legal requirements affecting Lutheran schools. The first part deals with Lutheran schools under law and begins by touching on parental rights and responsibilities for choosing their children's education. State laws affecting private schools are then outlined, including laws concerning state approval, compulsory education, public support, tax exemption, and other school issues. Part 2 concentrates on the responsibility and liability of the congregation, board, principal, and teacher in the Lutheran school. Concerning the responsibility of the board of education, this section touches on the Family Educational Rights and Privacy Act, nondiscrimination on the basis of race or sex, due process rights, and the copyright law. The concept of negligence is explained and related to the liability of teachers and principals.

Pell, Sarah W.J. Liability of School Board Members. National Organization on Legal Problems of Education, Topeka, KS, 11 pp., 1981.
Chapter 9 of a book on school law traces court rulings concerning the liability of school board members. Political and governmental functions performed by school officers have generally been held immune from liability. In Wood v. Strickland, a school case, the U.S. Supreme Court held that while public officials are generally entitled to immunity from damages if they act in good faith, such immunity cannot be extended if the officials knew, or reasonably should have known, that their actions violated a constitutionally guaranteed right. The trend of Supreme Court holdings suggests increased vigilance over school board officials' activities in order to protect employees' constitutionally guaranteed rights. The substantive and procedural due process issues appear to be the most common types of constitutional violation. The issue of awarding damages in a liability hearing is still hotly debated.



"We understand you tore the little tag off your mattress."

III. Public Relations/Fundraising



"This is the part of capitalism I hate."

A. Books

Bagin, Don and Others. PR for School Board Members. A Guide for Members of Boards of Education and School Administrators to Improve and Strengthen School Information Programs. Volume 8: AASA Executive Handbook Series. ERIC/CEM State-of-the-Knowledge Series, Number Thirty-Three. American Association of School Administrators, 1801 North Moore Street, Arlington, VA 22209 (Stock No. 021-00458), 74 pp., 1976.

A majority of the people in the United States believe school boards are doing an inadequate job of informing them about board activities, according to a 1975 survey. This handbook is intended to inform school boards of the need for effective communication and to offer suggestions for establishing constructive contact with the public and with school personnel. All board communication efforts should be centered around a board communications policy that identifies avenues of communication and specifies who will be responsible for what communication functions. Copies of this policy should be made available to all school district employees, advisory committees, and all other organizations that have a special (even if temporary) relationship with the schools. This review of the literature on school public relations includes sections on board meetings, the news media, internal and external district publications, how to obtain feedback from the community, handling crises and controversies, and obtaining information.

Bagin, Don. How to Start and Improve a P.R. Program. National School Boards Association, P.O. Box 1496, Evanston, IL 60204, 54 pp., 1975.
This is a primer designed to help the school management team communicate better. It offers guidelines and ideas for establishing and improving public relations efforts. Chapters cover such subjects as what public relations can do for schools, how to start a public relations program, and the public relations roles of school officials, as well as the specifics of getting the job done, working with the community, getting the most from the media and publications, developing public relations strategies for board meetings, and planning and evaluating public relations efforts. The final section is a "yellow pages" that presents other sources of information on the subject.

Gordon, Robbie. We Interrupt This Program . . . A Citizen's Guide to Using the Media for Social Change. Citizen Involvement Training Program, 225 School of Education, University of Massachusetts, Amherst, MA, 1978.
A manual for citizens and citizen groups interested in knowing more about 1) rights of public access to the media, 2) establishing media goals and identifying appropriate strategies, 3) planning media campaigns, 4) setting up a media committee, 5) how to write press releases, PSAs and community announcements, 6) who owns the media, 7) alternative PR strategies, 8) using technology as a community organizing tool, and 9) future media directions and implications for citizens.

Mitiguy, Nancy. The Rich Get Richer and the Poor Write Proposals. Citizen Involvement Training Program, 225 School of Education, University of Massachusetts, Amherst, MA 01003, 1978.
A training manual on fund-raising for nonprofit organizations and citizen groups. The lack of money and other resources is often a major stumbling block for effective citizen action. This manual contains information, training activities and suggestions for making the funding process more understandable and manageable. It covers 1) training exercises on developing community support, asking for money, interviews with funding sources, etc., 2) information on both grass-roots fundraising and grantsmanship, 3) steps involved in raising money for citizen groups, 4) information on how to research possible funding sources, 5) various fund-raising approaches, and 6) suggestions for avoiding common pitfalls.

Movshovitz, Helen. Press and Community Relations. What Every School Board Member Should Know Series, Vol. 4. New Jersey Boards Association, P.O. Box 909, Trenton, NJ 08605, 106 pp., 1975.
Designed to serve as a handy and useful reference for everyone in the education community, this handbook offers an overview of what a school public relations program should do and a general guide to constructing a program that has a good chance to succeed. It is intended to make evident the great need for everyone connected with the school to communicate with the public on a straightforward, thorough, and continuing basis. The guidelines and ideas contained are offered as suggestions rather than as hard and fast rules. Chapters discuss the need for public schools to communicate, the foundation of a public relations program, the design of the program, who should communicate, the media, the production of publications, budget elections and bond referendums, the board meeting's place in the public relations program, criticism and crises, and evaluation and feedback. Numerous appendices contain suggestions from other sources. A bibliography is included.

Rowson, Joseph P. Communication Handbook for School Board Members. National School Boards Association, 1055 Thomas Jefferson Street, N.W., Washington, DC 20007, 52 pp., 1977.

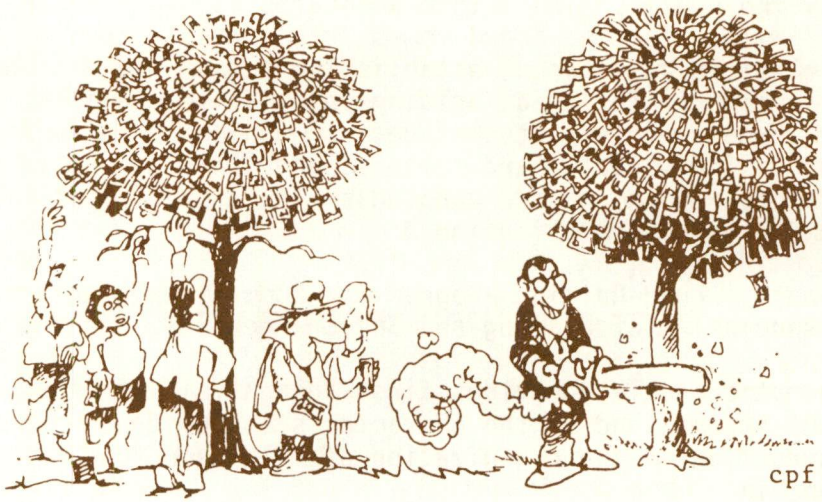
This booklet is aimed at helping school board members better understand the public relations process and build stronger support for public education. The public expects board of education members to be responsible, energetic communicators who are genuinely responsive to isues raised by the public. The author advocates identifying the various "publics" with which the board comes into contact, seeking professional public relations assistance, establishing a communication policy that is conscientiously followed, holding informative meetings, developing effective problem-solving techniques, communicating effectively as a board and as individual board members, and learning how to handle values conflicts. Each chapter concludes with a brief list of helpful hints on improving communication.

Stophlet, Donald. Fund-Raising Program for Community Voluntary Agencies. National Association of Hearing and Speech Agencies, Washington, DC, 57 pp., 1968.

This pragmatic booklet provides first an analysis of needs, of the sources of income, and of the characteristics of donor groups, and then instruction in the organization of volunteer fund raising and in grantsmanship.



B. Papers and Journal Articles



Bender, Louis W. "PR: It's Everyone's Job." New Directions for Community Colleges, Vol. 5, No. 4, pp. 85-90, Winter 1977.
Colleges should guard against a solely local focus in public relations, encouraging individuals within the college to participate in state and national professional affairs. Recognition will also come if the college is an active member of the state system and the national higher education enterprise.

Brodinsky, Ben. "Why Your School Board Needs a Good Public Relations Program." Paper presented at National School Boards Association Annual Convention (32nd, San Francisco, CA, April 15-18, 1972, 10 pp., April 1972.
This paper discusses the public relations problem facing school boards and suggests board action to alleviate these problems. The author emphasizes that one of the most critical instruments of public relations is the board meeting. To improve board meetings as mediums of public relations, the author suggests 1) improving procedures for handling business matters, 2) adopting a more deliberate approach to policy formation, and 3) opening at least one meeting a month to the public as an instrument of public relations. The author also suggests methods for obtaining public involvement in school affairs.

Community Council of Greater New York. "Board Seminar on Citizen Participation, August 27, 1971." Community Council of Greater New York, 225 Park Avenue South, New York, NY 10003, 21 pp.
Four papers on citizen participation or consumer involvement.

Cooper, Constance D. "Improving School Community Relations: A Programmatic Model." Catalyst for Change, Vol. 9, No. 3, pp. 4-6, Spring 1980.
The components of an effective school community relations program include a newsletter or newspaper, a demographic profile of the community, parent invitations to student-oriented activities, and a list of 10 strategies administrators can use.

Gale, Robert L. "Fund-Raising Clout: How You Can Help Strengthen Your Institution's Board with Trustees Who Can Give--and Get." CASE Currents, Vol. 7, No. 4, pp. 18-20, April 1981.

One of a college development staff's greatest responsibilities is seen as helping the president and the governing board's nominating committee to build the board's fund raising potential. Developing a board profile can assess current strength in fund raising and other areas. A sample board profile form is provided.

Harms, Edward C. Jr. "Closed (Executive) Sessions: How to Use and Present Them to the Public." Paper presented at the Annual Meeting of the National School Boards Association (41st, Dallas, TX, April 11-14, 1981), 15 pp., April 1981.

The author makes two initial assertions regarding the use and presentation of closed meetings. First, the real problem is not how to present them to the public, but how to present them to the media. Second, closed sessions should never be used unless absolutely necessary. After presenting the reasons for the "sunshine" laws, the author cites exceptions to such laws: discussions of attorney-client matters (especially involving litigation), collective bargaining matters, some personnel matters, records that are exempt from disclosure, real property negotiations, or student expulsions. Although other subjects might best be discussed privately, state legislatures have determined that the advantages of disclosure outweigh the advantages of privacy. The only exceptions are when private rights are involved or where public interest would be immediately (not just potentially) damaged. Possible embarrassment of board members or employees is not sufficient reason for a closed meeting. If a session must be closed, the reasons for doing so ought to be documented in writing. The discussion must be prevented from straying to another topic that cannot be discussed in closed session. As soon as possible, any decision made must be explained publicly as fully as possible.

Holiday, Albert E. "Put the Public Back into School P.R." Updating School Board Policies, Vol. 11, No. 5, pp. 1-3, 5, May 1980.

Suggests how a board can help restore public confidence in education by providing a foundation of information creating a climate of positive human relations within the schools, and involving citizens in schools and with education.

Mullins, Carolyn. "How to Get Along with Your Local Newspaper and How to Get Good Press, Too." American School Board Journal, Vol. 160, No. 10, pp. 31-34, October 1973.

The press has a definite relationship to the proper function of a school board, and the board has an obligation to foster and promote that relationship.

Nelson, Janet L. "Improving the School Board Image." Paper presented at the Annual meeting of the National School Boards Association (37th, Houston, TX, March 26-29, 1977), 7 pp, March 1977.

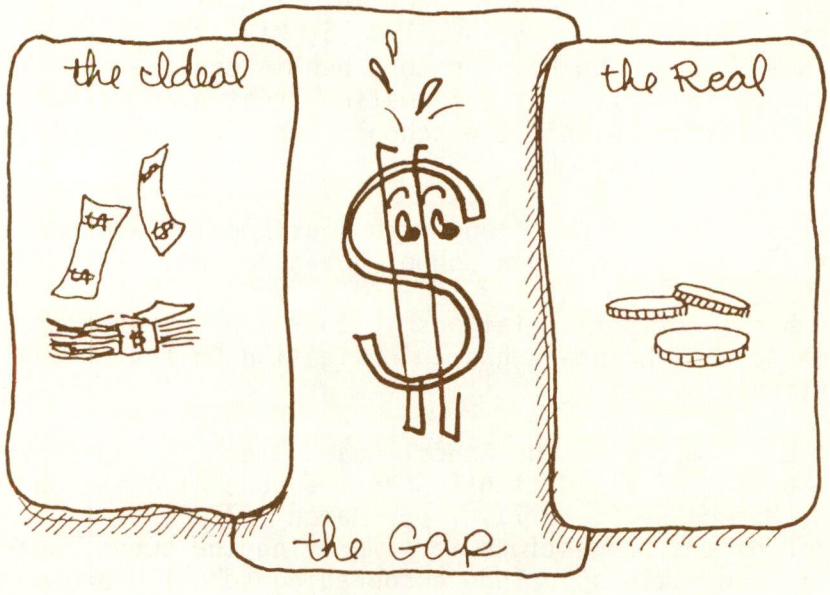
The speaker offers suggestions for improving the school board's public image. The suggestions include encouraging school board members to speak to community groups, hiring a trained person to work with the media, having board members visit schools and school advisory meetings, hiring community volunteers, and putting out an occasional newspaper supplement to inform the public of the board's actions.

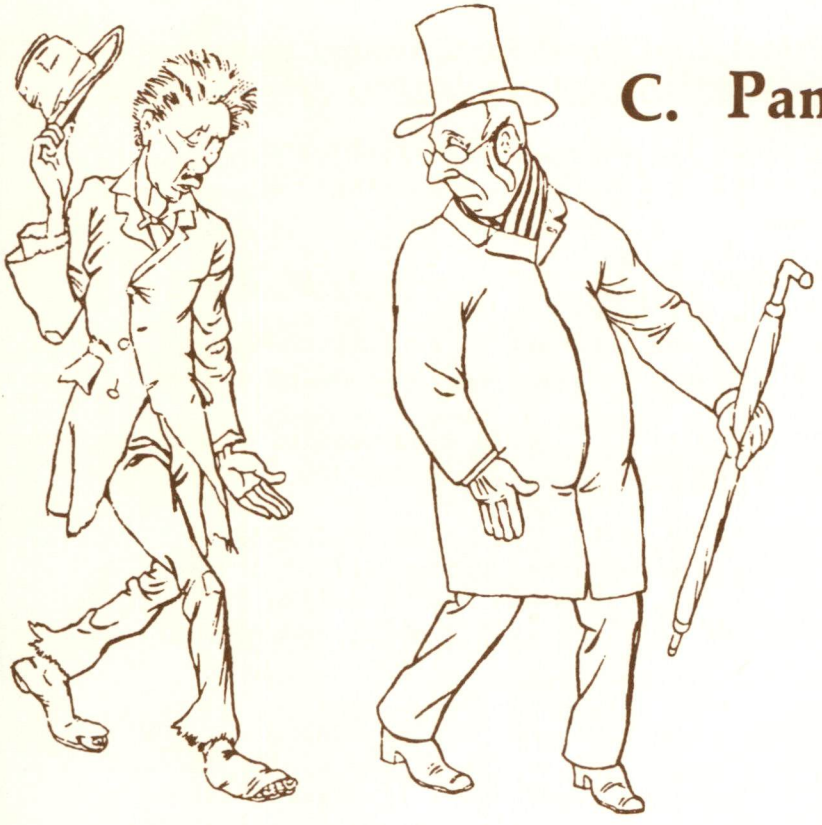
Van Antwerp, David and Sexton, Michael J. "Honest Participatory Management with Community Councils." Community Education Journal, Vol. 7, No. 3, pp. 24-26, April 1980.
Participatory management, involving the delegation of power and authority, provides several strategies to involve the community in the decision making process.

West, Philip T. "The Making of a School PR Director." Journal of Educational Communication, Vol. 4, No. 1, pp. 28-29, Winter 1980.
The role of the school public relations director is rapidly changing from that of a journalist to a manager of a complex information system.

Whittier, H. Sargent, Jr. "Leadership Giving: Key to a Successful Fund." New Directions for Institutional Advancement, No. 7 (Increasing Annual Giving), pp. 59-68, 1980.
The success of the annual fund-raising campaign is seen to depend in large part on a careful search for and cultivation of a select group of generous donors. Leadership giving is defined, and creating gift clubs, solicitation, competition and challenges, pitfalls, and renewal are discussed.

Wygal, Benjamin R. "Public Relations: Concepts, Authority, Control." New Directions for Community Colleges, Vol. 5, No. 4, pp. 11-18, Winter 1977.
A three-fold approach to public relations is needed: 1) dissemination in which an accurate image of the college is developed; 2) organization that stems directly from the president's office; and 3) control, defined as careful attention to operation and coordination with overall authority retained by the chief executive.





C. Pamphlets and Manuals

Improving School Community Relations. Canadian Education Association, 252 Bloor Street, W., Toronto 5, Ontario, Canada, 37 pp., March 1971.

This booklet provides a broad outline of some major aspects of a school community relations program. The report attempts to stimulate greater awareness among school officials, trustees, and others of the potential scope of such programs; and to encourage more school boards to initiate activities designed to bring the schools into closer rapport with the communities they serve. Major topics cover 1) the roles of the board, the information officer, and the principal in school community relations; 2) relations with the media; 3) community participation in school affairs; and 4) board publications.

Howlett, Patricia E. How to Work with the Media. California School Boards Association, 916 23rd Street, Sacramento, CA 95816, 35 pp., July 1980.

This manual for school board members identifies the basic factors to take into account when dealing with the news media. These factors include knowing what kinds of media offer what kinds of coverage in the school district's local area and how to channel the right information to the media representative who can make the best use of it. Divided into sections on newspapers and broadcast media, the manual discusses both how to respond to questions from representatives of these media and how the board itself can initiate use of the media. An appendix provides a basic list of do's and don'ts for establishing good relations with the media, including how to approach the media, how to prepare the district's staff for responding to the media, how to prepare yourself, and how to look at the community when contemplating the release of information.

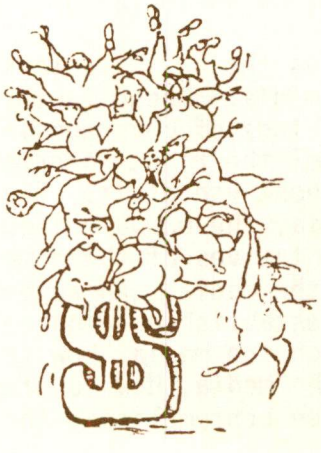
Nason, John W. Trustees and the Future of Foundations. Council of Foundations, 888 Seventh Avenue, New York, NY 10019, 1977.

A Dozen Projects to Improve Relations with Your Community. Boardguide. National School Boards Association, 1055 Thomas Jefferson Street, N.W., Washington, DC 20007, 28 pp., 1979.

This guide offers 12 projects that school boards can initiate to counter alienation and strengthen relationships among themselves, the public they represent, and the staff and students whom their decisions affect. Already tried and tested by a variety of school districts throughout the U.S., the activities include an annual citizen conference on education, a realtors' seminar, public neighborhood forums, organizing parents to help set goals for the district, monthly luncheons with community leaders, curriculum presentations, an annual art show, a weekly employee newsletter, a newspaper column, informal sessions with students, an awards ceremony for outstanding student achievement, and receptions for retiring employees.

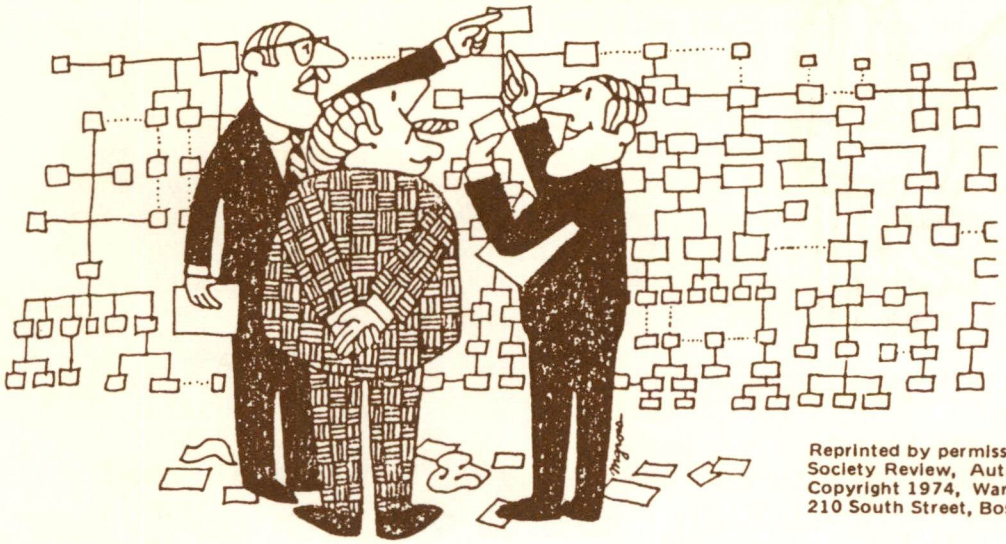
School-Community Communication: School Board Members and Their Constituents. Research Report 1980-1. National School Boards Association, 1055 Thomas Jefferson Street, N.W., Washington, DC 20007, 27 pp., 1980.

Based on results of a survey conducted at the 1979 National School Boards Association Convention, this report focuses on the channels, frequency, and topics of communication between board members and their constituents. A total of 759 board members completed the survey instrument. The data presented show that on the whole moderate levels of communication are the norm in districts throughout the nation. Direct contacts between board members and district residents do not absorb a large proportion of the time board members devote to the schools. Moreover, in most districts the media, particularly television, do not routinely report on a full range of school system activities or school board decisions. The board meetings themselves are not ordinarily attended by large numbers of citizens. Specific incidents change customary patterns of school board-community interactions. School boards tend to be more open to public participation when conflict and competition for board seats are high. Further, research suggests that when citizens desires for involvement in school governance grow, they want more decentralization of decision-making, and they prefer board members to adopt the position of delegate--transmitting the public will into votes.





IV. Nominating Process/ Board Recruitment



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A. Books

McAfee, Jane. The Nominating Committee in the Community YWCA. Young Women's Christian Association, New York, NY, 30 pp., 1961. Bibliography, standard forms, sample ballots.

Brief outlines of the Nominating Committee's significance, authority, accountability and makeup; detailed description of the Committee's work from planning to election, including a committee calendar and a section on how to select and approach candidates.

Trecker, Harleigh B. Building the Board: A Manual on Recruiting and Molding Effective Board Members for Your Organization. National Publicity Council for Health and Welfare Services, New York, 109 pp., 1954. Bibliography.

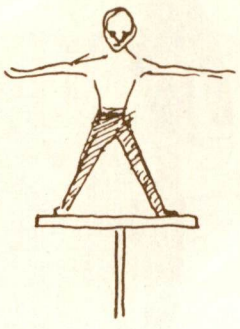
The major areas covered are: the analysis of the board member's job and of his "job requirements," the selection and work of the Nominating Committee, and the new board member's orientation and training.





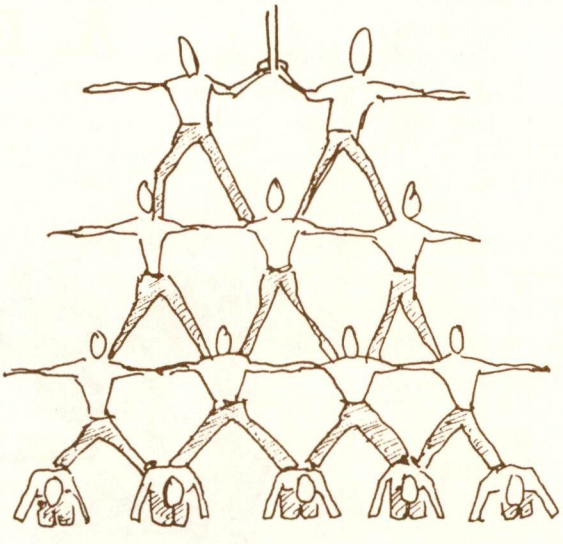
Bob Biagi

C. Pamphlets and Manuals



Camp Fire Girls, Inc. Membership. Guideline Series 2 (Catalog No. D-224), New York, 1970.
A manual for Nominating Committees of Local Councils of Camp Fire Girls, Inc.

Swanson, Andrew. Leadership Development and the Nominating Process. Community Services Consultants, Ltd., Providence, RI, 1981.
This monograph deals with developing leaders within boards and the nominating process. It presents a system for full board involvement in the identification of prospective board members. It explains in detail the recruitment and invitation process as well as the president's role in leadership development. The monograph concludes with a fifteen point checklist for an effective leadership development program that can immediately be put into effect.





V. Chief Executive Officer/ Board Member Relations

A. Books

Schmidt, William D. The Executive and the Board in Social Welfare. Howard Allen, Inc., Cleveland, OH, 1959.

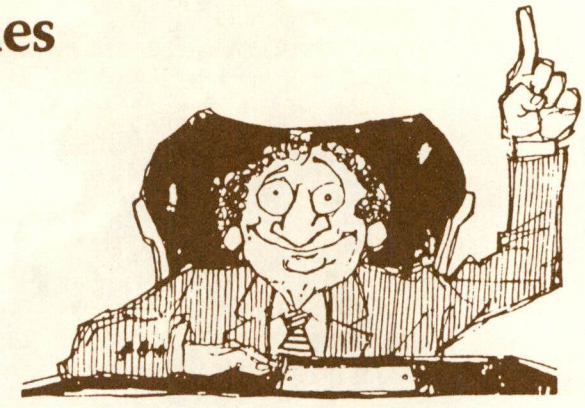
Young Women's Christian Association; Blumenthal, Louis H. How to Work with Your Board and Committees: A Guide to Productive Board-Staff Relations. Association Press, New York, 64 pp., 1954. Bibliography. Bureau of Communications, National Board, YWCA, 600 Lexington Avenue, New York, NY, 10022.

A booklet addressed to Executives, this is an interesting and readable outline of the administrative partnership between the Board and the Executive.

Young Women's Christian Association. Board Members and the Executive Director. Bureau of Communications, National Board, YWCA, 600 Lexington Avenue, New York, NY 10022, 40 pp.

A basic summary of organizational relationships to encourage the new board member in new responsibilities with respect to the Board and the Executive Director.

B. Papers and Journal Articles



Brooks, Maryanne. "Management Team Builds Trust Between Board, Superintendent." Thrust for Educational Leadership, Volume 8, No. 2, pp. 10-11, November 1978.

A good management team can build trust and confidence between the board and the superintendent, as well as the site administrators and staff, because everybody has a chance to know what is going on, why, and help contribute to finding answers, rather than being on the sidelines.

Burk, James M. "Developing an Effective Board-Administrative Team." Paper presented at the Annual Meeting of the National School Boards Association (37th, Houston, TX, March 26-29, 1977), 10 pp., March 1977.

The relationship between boards of education and school administrative personnel has been eroding, with some middle management personnel forming their own bargaining groups. It is the author's opinion that universal collective bargaining rights for administrators will prove to be tragic for education. He therefore supports involvement for principals, supervisors, and other midlevel administrators in policy-making. He advocates separating policy and procedural issues from salary issues, a goal that can be accomplished by creating two committees, one to consider each area. The goal is to establish a climate between board members and administrators that emphasizes mutual respect and understanding.

Cleary, Robert E. "Something Personal About It. AGB Reports, Volume 22, No. 2, pp. 39-42, March-April 1980.

A survey of board chairmen and presidents is discussed and it was discovered that how well chairman and president work together depends less on any characteristic of the institution than on the personal factor, the degree of trust and respect the two feel for each other.

_____. "Trustee-President Authority Relations." Educational Record, Volume 60, No. 2, pp. 146-158, Spring 1979.

A survey conducted to assess the roles of university trustees and presidents and their conceptions of these roles is described. Differences of opinion on roles are apparent on moral and social questions, on academic policy, and on financial policy. The importance of teamwork and a cooperative relationship is emphasized. The survey instrument is appended.

Dickinson, William E. "The Necessary Tension in the Board-Superintendent Relationship." Updating School Board Policies, Volume 4, No. 10, pp. 1, 4, October 1973.
Urges that the necessary tension that is built into the school board-school superintendent relationship rather than being feared, be harnessed to advance the quality of local school progress. Cautions that written policies on board-superintendent relations are necessary.

Fletcher, Verna M. "Policy and Administration: Who Does What?" Paper presented at the Annual Meeting of the National School Boards Association (40th, San Francisco, CA, April 19-22, 1980), 12 pp., April 1980.
The question of who develops and adopts the rules and regulations to implement educational policies is at the center of the role controversy between boards of education and superintendents. The purpose of this paper is to clarify the demarcations between policy-making and administrative roles. Certain assumptions about board and superintendent relationships determine perceptions of policy-making and administrative roles: the board of education has the ultimate responsibility for the schools; every local board of education has some relationship with its state board; the board of education selects, directs, and evaluates the superintendent; board members represent the community; and, there is a great difference in how board members define their role in policy-making and administration. In practice, there is no single definite line between policy and administration. It is up to the board and superintendent to set working definitions. Some guides to help reach agreements are to know what is supposed to be, know the reality, know what can be, and know the pitfalls.

Friesen, D.; Bumbarger, C.S., Eds. Board/Administrator Relationships. Department of Educational Administration, The University of Alberta, Edmonton, 7, Alberta, Canada, 101 pp., April 1970.
This report contains the proceedings of the conference, which focused on the relationship between the administrator and the school board. Four authors discuss this relationship from different perspectives. Rolland W. Jones enumerates a number of hallmarks of the ideal relationship as he sees it. Frank Beinder presents the trustee's view of the most efficiacious board/administrator relationship, and F.J. Gathercole does the same from an administrator's point of view. F.C. Thiemann gives an organizational model of the board/administrator relationship best suited to future education. A major theme of all four essays is that mutual respect, trust, and support between board members and superintendents are key elements in any successful educational organization.

Heller, Mel. "Ten Sure-Fire Ways to Kill a Superintendent." American School Board Journal, Vol. 165, No. 5, pp. 25-27, May 1978.

Ingram, Richard T. "The Marriage of Presidents and Boards." New Directions for Community Colleges, Volume 7, No. 4, pp. 73-82, Winter 1979.
Reviews the current roles and responsibilities of college presidents and board members in maintaining good relationships, and proposes a new board structure along with a mechanism for joint review.

Johnson, Carroll F. "A Modest Proposal to Improve Board-Superintendent Relationships." Updating School Board Policies, Volume 11, No. 2, pp. 3-5, February 1980.

Emphasizes the need for communication between boards and superintendents and offers specific suggestions to improve relationships between them. Areas discussed include selection procedures, evaluation of superintendents, and the maintenance of board credibility.

Kammann, Richard. "Board and Superintendent: Building the Effective Team." Paper presented at National School Boards Association Annual Convention (32nd, San Francisco, CA, April 15-18, 1972), 13 pp., April 1972.
In this speech, the process problems facing school boards are examined, and techniques for overcoming these problems are suggested. According to the authors, a school board is a collection of diverse individuals characterized by: 1) a lack of criteria to define excellence, 2) a lack of specific goals to focus its work on, 3) a lack of broad policies to define its stance on critical issues, 4) little or no knowledge of employee motivation, 5) ineffective board committees, 6) mutual distrust, 7) time wasting inefficiency, and 8) a lack of properly trained people for the job. To remedy these problems, the author proposes the implementation of organizational development principles. As an alternative, he suggests that traditional boards be replaced by professional boards appointed by State departments of education.

Kutlat, James H. "Clash: Superintendents Oppose Boards." American School Board Journal, Volume 186, No. 5, pp. 37, 41, May 1981.
Argues that superintendents must actively oppose their school boards when the boards seem bent on making policies the superintendents consider unwise. Outlines situations in which the superintendent's opposition is not only warranted, but necessary.

Morgan, K.D. "The Critical Status of Board-Superintendent Relations." Kansas School Board Journal, Volume 14, No. 2, pp. 7-9, April 1975.
Asserts the importance of the board-superintendent relationship and discusses some of the areas in that relationship that have the greatest potential for difficulty. (Published by the Kansas Association of School Boards, 825 Western, Topeka, KS.)

Polk, Charles H., and Others. "Building the Management Team." New Directions for Community Colleges, Volume 4, No. 3, pp. 33-37, August 1976.
Reviews nine issues which influence the working relationship between the president and the board of trustees. Recommends that the board and the president act as management partners, not as adversaries.

Rumford, Ms. Lewis, II. "Board Member and Executive: How They Serve Agency and Community." Child Welfare, Volume XLVII, No. 3, pp. 171-174, March 1968.
A discussion of how a better "partnership" can be achieved. The point of view is that of the Executive as "enabler."

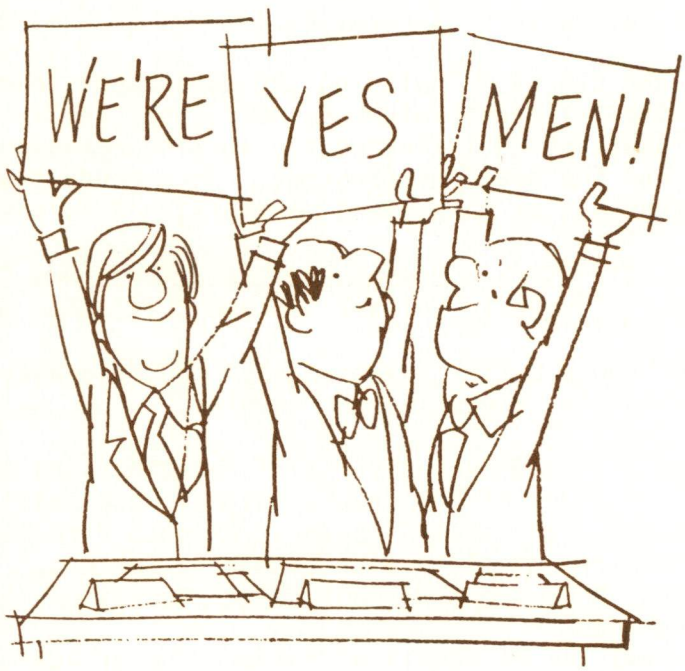
Schatz, Harry Aaron. "Board-Executive-Staff Relationships in Voluntary Social Agencies: A Study of Primary Functional Responsibilities as Perceived by Presidents, Executive Directors, Program Directors, and Physical Education Directors of 110 Jewish Community Centers." Unpublished Ph.D. Dissertation, Department of Public Administration, New York University, February 1965.
An exhaustive analysis of functions followed by an assignment of functions as between Board, Executive, and Staff; finally an analysis of these functions within various administrative areas.

Senor, James M. "Another Look at the Executive-Board Relationship." Social Work, Volume VIII, No. 2, pp. 19-25, April 1963.
An excellent, well-documented analysis of the power balance between Board and Executive. This paper advances a theory of Executive power, stating the conditions that would favor the Executive's gaining control over his Board. By implication, it also suggests ways for Boards to retain their autonomy.

Stone, Ronald F. "Board-Administration Teamwork in Collective Bargaining." NASSP Bulletin, Volume 62, No. 421, pp. 108-113, November 1978.
The success or failure of any negotiated agreement depends on the reciprocal support between boards and their administrators.

Thomas, M. Donald. "Partner of the Board. The Board/Superintendent Relationship." California School Boards, Volume 34, No. 3, pp. 4-6, March 1975.
A strong superintendent-board partnership is based on six elements: full disclosure, sufficient information, careful planning, informal interaction, period evaluation, and mutual support. (Published by California School Boards Association, 800 9th Street, Sacramento, CA 95814.)

Whittier, H. Sargent, Jr. "How Much Access? The Chief Development Officer's Relationship with Trustees." CASE Currents, Volume 7, No. 4, pp. 22-24, April 1981.
Some suggestions on how a college development officer can relate to the president and to trustees are provided: getting the endorsement of top trustees, serving the president first, understanding how policy is made and implemented, knowing trustees personally, involving trustees in development planning, and backing institutional policy.



C. Pamphlets and Manuals



Bob Biagi

Roles and Relationships: School Boards and Superintendents. American Association of School Administrators, 1801 North Moore Street, Arlington, VA 22209, 13 pp., 1980. (Stock No. 021-00204.)

The roles and responsibilities of school boards and superintendents are different, but linked. School boards are primarily concerned with establishing policy and representing the educational interests of district constituents. Superintendents are charged with translating policies into administrative practice and with providing professional expertise to the district. The specific responsibilities of boards and superintendents and factors affecting their relationships are described briefly in this pamphlet. The authors also stress the importance of estabishing a communications system and of stating the nature of the board-superintendent relationship in writing.

Coppock, Nan. Board Administrator Relationships. Educational Management Review Series Number 22, Oregon University, Eugene, OR, ERIC Clearinghouse on Educational Management.

Theoretically, the relationship between boards of education and school administrators is well-defined--the board makes policies, and the superintendent implements those policies. However, the lines of responsibility are not that clear-cut, leading to a variety of problems involving school boards and administrators. In examining documents dealing with the board-administrator relationship, this review focuses on maintaining the harmonious relationship, contemporary issues and solutions, and the future. A common theme is that mutual respect, trust, and support between board members and superintendents are key elements in any successful educational organization. Some of the contemporary problems discussed include ways of changing the present school system, legal and social accountability, imbalances of power, and collective negotiation. Predictions about the future, centering primarily on school boards, range from suggestions for revised functions to replacement by "consensus organizations." Ten of the documents are available from the ERIC Document Reproduction Service.

Gies, Joseph C; Anderson, Wayne W. The Board Chairperson and the President. Association of Governing Boards of Universities and Colleges, One DuPont Circle, Suite 720, Washington, DC 20036, 9 pp., December 1977.

The roles of the board chairperson and president of a college or university and their joint leadership responsibilities are discussed in this pamphlet. The chairperson's primary role is to represent and symbolize the final legal authority, responsibility, and continuity of the institution. An important responsibility of the chairperson is to lead the board in continuous evaluation of its effectiveness. In coordination with the president, the chairperson must also lead the board in meeting its obligation to communicate board policies and decisions to the institution and to the public. The chairperson must be a skillful spokesperson for the institution and provide leadership in resource acquisition and allocation and institutional planning. Two principal functions of the president in relation to the board are to inform or advise and to implement policies recommended by the board. The president must serve as the main communications link between the board and the faculty and students. Selection and evaluation processes for the two leaders and personal attributes ideally needed to work successfully as a team are discussed. Joint responsibilities of the two leaders include working with the board, preparing the agenda of board meetings, dealing with situations that require policy formulation or interpretation, and working out collective bargaining problems.

The Organization and Function of the Governing Boards and the President's Office. A Discussion Memorandum. Harvard University, MA, University Committee on Governance, 78 pp., March 1971.

This paper identifies the problems observable in the organization and operations of Harvard University's Governing Board and President's Office. It poses issues requiring decisions and in some instances makes recommendations. The report first examines the Board of Overseers; the issues of power, such as lay control over universities, and the distribution of power among faculties, administration and governing boards; issues of composition, election, and terms of office, including the nominations process; issues of effectiveness, including the consent function and staff organization; the adequacy of the Committee structure; and faculty and student interaction with the Board of Overseers. These same issues are also examined as they pertain to the Corporation. For the Office of the President, issues of power, including limitations to this power, are discussed, as well as administrative functions, educational functions, and new functions, including: transactions with the Governing Board, leadership of the Council of Deans and Senate, leadership of a strengthened central staff, and relating Harvard to its external communities. A chart of the composition of Harvard University is included in the appendix.

Hess, Fritz. Board-Administration Relationships: A Key to Public School Governance. Prepared for the New York State Council of School District Administrators Annual Meeting, 61 pp., September 27, 1979.

This document explores the relationship between school boards and administrations, with the purpose of gaining insight about both the history and the future of public schools. First it discusses the history of their relationships up to the present time when the two bodies function as rough equals. Next it summarizes various models of board-superintendent relationshps. Approaches that concentrate on the types of procedures employed, such as the harmony and pluralistic models, contrast with those that focus on particular loci of power, such as the administrative leadership model. Viewpoints that emphasize the environment in which school administration works--the systems model--

contrast with those that focus on the actual institution involved, such as the harmony, pluralistic, and administrative leadership approaches. The final section of the paper discusses influences such as adaptation, trust, and respect that can aid in the development of continuity. The paper concludes that an analysis of these topics can produce important perspectives on the workings of public school governance as well as form the basis for more comprehensive research.

Hickcox, Edward S. Trustees and Administrators: The Case for a Working Relationship. 12 pp., March 1973.

With the shift to larger units of administration in Ontario, there is a need for the realization of a working relationship between the two roles of administrator and trustee, based on the strengths of each. The strength of the administrator is in his skills as manager and co-ordinator and communicator and in his ability to communicate on a technical level with the centers of power in education, namely, the Ministry of Education and the professional staffs. The strength of the trustee is in his position of elected representative of the community, as a translator of the community needs, as the ultimate payer of the bills. The point of articulation, therefore, is in the relationship between trustees and administrators.

Magnani, David P. How Do We Create Effective Board/Staff Interaction? Citizen Involvement Training Program, 225 School of Education, University of Massachusetts, Amherst, MA, 1977.

This is a transcript of a workshop. It has exercises for participants to illustrate effective and ineffective interaction, methods of coping with jargon, and a large well developed section of board aid to staff, and staff to boards.

Morse, Stuart E. The President's Relationship to the Board. 8 pp., 1980.

While members of a college's board of trustees expect the president to provide them with accurate and timely information, individual trustees also have a responsibility to help the president do an effective job. The board should understand that the president is the one college administrator with an overview of the enterprise as a whole: his/her advice, therefore, should be carefully considered in board matters such as institutional finance, facilities planning, public relations, establishing institutional goals, assessing institutional performance, preserving the institution's autonomy, and settling internal disputes. In addition, board members can take several steps to insure a harmonious board-president relationship, including: 1) develop policies that are workable; 2) realize that the president must make reasonable decisions that may not be universally acceptable; 3) keep politics out of board activities; 4) carefully study board meeting agendas beforehand; 5) refer operational questions to the president; 6) expect communications with college personnel to be channeled through the president; and 7) remain aware of community attitudes toward the college. While the board has the responsibility for setting institutional policy, trustees should leave to the president the responsibility for establishing rules and procedures for the implementation of that policy.

McMillan, William J. "Private Schools: Boards and Heads." Ferguson E. Peters Company, 800 East Broward Boulevard, Suite 506, Fort Lauderdale, FL 33301, 90 pp., 1980.
Private school governing boards and their relationship with school heads are discussed in this booklet. Based on his experiences as a board member, the author counsels on the size of the board, selection of board members, length of membership, and board election. Specific advice is offered about the conduct of meetings. Other chapters outline the function of the governing board, the function of board committees, and the advantages of an advisory board. Headmaster-board relations and the selection of a new headmaster are discussed. In the concluding chapter some instances of poor behavior by headmasters and boards are cited as examples of actions to be avoided.

Murdick, Olin J. The Principal and the Advisory Board. 14 pp., 1978.
This report discusses the importance of a policy-guided administration. Policies enable an educational institution to attain credibility and continuity and to achieve its objectives. The principal's role as educational leader and executive officer is to help the board to identify policy needs and to monitor and evaluate programs. Policy-making is basically the board's prerogative. Every board of education has four responsibilities: 1) to establish the objectives of the school, 2) to determine polocies, 3) to review decisions made by the administrative staff, and 4) to evaluate policy decisions.

National Council of Young Men's Christian Association. "The Development of Competence in Working with Boards, Committees, and Councils." National Council of Young Men's Christian Association, 291 Broadway, New York, NY 10007, 7 pp.
A detailed little manual for Board Secretaries, geared to the needs of the YMCA, but nonetheless of more general usefulness.





VI. Policy/Goals/Evaluation

A. Books

Dale, Duane and Mitiguy, Nancy. Planning for a Change. Citizen Involvement Training Program, 225 School of Education, University of Massachusetts, Amherst, MA, 1978.

Citizen groups generally need to spend more time than they do at planning or developing strategies. They need to plan creatively in order to come up with innovative ideas that deal directly with the issues that concern them. This manual helps a group do that, by providing specific methods in easy-to-follow exercise format. There's a section on each major step in the program development sequence: analysis, generating program ideas, decision making, implementing and evaluating. Specific techniques include force-field analysis, goal revision, brainstorming, problem redefinition, opportunity analysis, feasibility check, contingency planning, timelining and others. Case histories from the experience of actual citizen groups illustrate how these techniques can be applied in real-life situations. Discussion questions, annotated bibliography.

Daneke, Gregory A.; Steiss, Alan Walter. Administrative Policy Analysis, Budgeting, Implementation, and Evaluation: An Overview to Policy/Program Analysis and Evaluation Techniques, Package VI. Virginia Polytechnic Institute and State University, Blacksburg, VA, Division of Environmental and Urban Systems, 123 pp., 1977.

This overview serves as an introduction to a series of ten curriculum modules that comprise a portion of the National Training and Development Service Urban Management Curriculum Development Project. The overview was designed to provide a generalized discussion of the field of government policy/program analysis and evaluation. The training program for municipal managers is based on a conception of public management that combines and expands the traditional approaches of public administration, policy analysis, comprehensive planning, public budgeting, and fiscal/economic analysis into a coordinated process capable of yielding rational public policies and decisions. The overview discusses policy analysis within the context of public administration, presents a systems theory perspective and its effect on policy analysis, and introduces the ten curriculum modules which comprise the program.

Daneke, Gregory A.; Steiss, Alan Walter. Policy/Program Implementation. Instructors' and Students' Manual. Module Number Ten of Policy/Program Analysis and Evaluation Techniques, Package VI. Virginia Polytechnic Institute and State University, Blacksburg, VA, Division of Environmental and Urban Systems, 122 pp., 1977.

This packet contains the materials necessary for presentation of the tenth of ten modules that comprise a portion of the National Training and Development Service Urban Management Curriculum Development Project. This module focuses on policy/program implementation which is concerned with clarification of goals, task delineation, organization, planning, scheduling, delegation of responsibilities, and follow-up. This packet consists of a combined instructor's and student/participant's manual providing background information on program implementation and case studies which are the vehicles for introduction and application of implementation concepts.

Dunn, William N. Public Administration, Public Policy Analysis, Units 1-6, Package X. Pittsburgh University, PA.

This learning package comprises a portion of the National Training and Development Service Urban Management Curriculum Development Project. The six units included in the package focus on understanding, formulating, and implementing public policies. They additionally help to develop conceptual, methodological, and analytic skills essential to students of public administration. The units are concerned with major social problems such as unemployment, poverty, inequality, discrimination, crime, and drug and alcohol addiction. The specific units included in the package are: 1) The Logic of Public Policy Analysis, 2) Policy Problems, 3) Policy Outcomes, 4) Policy Alternatives, 5) Policy Action, and 6) Policy Performance.

Stuart, Robert C. Strategic Planning. Instructor's Manual, Module Number One of Policy/Program Analysis and Evaluation Techniques, Package VI. Virginia Polytechnic Institute and State University, Blacksburg, VA, Division of Environmental and Urban Systems, 213 pp., 1977.

This packet contains the materials necessary for presentation of the first of ten modules which comprise a portion of the National Training

and Development Service Urban Management Curriculum Development Project. This module introduces strategic planning, which is a process for reducing the uncertainty under which systems operate. Its primary objective is to broaden the base for making public decisions that have long range implications. The packet includes: 1) an instructor's manual which provides suggestions about the mechanical details upon which the success of the module depends, 2) a technical supplement which is an extension of and performs the same function as the instructor's manual, and 3) a student participant manual which discusses basic concepts in local government planning.





B. Papers and Journal Articles

"How to Make Your Policies Do What You Want Them to Do." American School Board Journal, Volume 163, No. 9, pp. 36-39, September 1976.
Discusses the need for school board policies and provides an outline of typical categories that should be covered by policies.

Brodinsky, Ben. "Policies on Things--And Policies on People." Updating School Board Policies, Volume 4, No. 11, pp. 1, 4, November 1973.
Argues that policies with ideas to develop the talents of people deserve more board time and energy than policies prescriving ways to handle things or to manage noneducational operations.

Cornett, R. Orin. "Masterly Planning." AGB Reports, Volume 19, No. 3, pp. 36-38, May/June 1977.
Trustees should not plan but they must assure themselves that the planning process is sound, complete, and based on realistic assessments. Suggestions for asking the right questions in the decision-making process are offered in this condensation of a speech made at the National Conference on Trusteeship.

Gamba, John F. "How to Evaluate a School Board." Information Legislative Service, Volume 11, No. 33, 8 pp., August 17, 1973.
Educational accountability must be applied as diligently to school boards as it is to superintendents, administrators, and teachers. Effective appraisal can take place only when performance is compared to objectives. The successful board demonstrates a commitment to providing public accountability in all phases of its operations. It must have the means to evaluate itself critically in terms of the quality of education funded by the taxpayer, the financial commitment to the taxpayer, the existence of effective employee and community relationships, and the management leadership demonstrated.

Gardner, John W. "How to Prevent Organizational Dry Rot." Harper's Magazine, 3 pp., October 1965. Reprint Service, Harper's Magazine, 2 Park Avenue, New York, NY.
Nine good rules for organizational self-renewal. A well-written, amusing article.

Herman, Jerry J. "Here's A Report Card to Use to Evaluate Your School Board--and its Members." American School Board Journal, Volume 165, No. 3, pp. 50, 60, March 1978.
Provides an instrument to use in evaluating the achievement and effort of individual board of education members or of the board as a whole.

Kowalski, Theodore J. "Here's a Plan for Evaluating Your Board." American School Board Journal, Volume 168, No. 7, p. 23, July 1981.
Provides a systematic model for evaluating school boards that should be adaptable to many school systems.

_____. "Why Your Board Needs Self-Evaluation." American School Board Journal, Volume 168, No. 7, pp. 21-22, July 1981.
Suggests that school boards consider voluntarily adopting a formal evaluation system and identifies what such a program can accomplish.

Lewis, Edmund. "Building a Bridge. The Board/Coimmunity Relationship." California School Boards, Volume 34, No. 3, pp. 19-20, March 1975.
In order to develop and improve a school-community relations program, the school board must have written policies and a written program. (Published by the California School Boards Association, 800 9th Street, Suite 201, Sacramento, CA 95814.)

Moberly, David L.; Stiles, Lindley J. "Getting a School Board to Address its Primary Tasks." Phi Delta Kappan, Volume 60, No. 2, pp. 36-37.
The Seattle, Washington school board members attended a retreat during the summer. At the retreat, which included the superintendent and a consultant-facilitator, the board examined the superintendent's self-evaluation and worked on long-range goals, short-term priorities, and professional effectiveness.

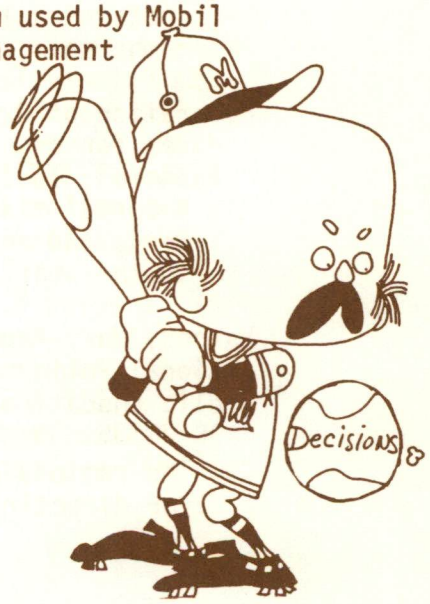
Polk, Charles H.; Coleman, Henry C., Jr. "Self-Evaluation, Key to Accountability." New Directions for Community Colleges, Volume 4, No. 3, pp. 27-31, August 1976.
Presents a self-evaluation instrument for community college boards of trustees and advocates that all trustees consider accountability and self-evaluation as high priorities.

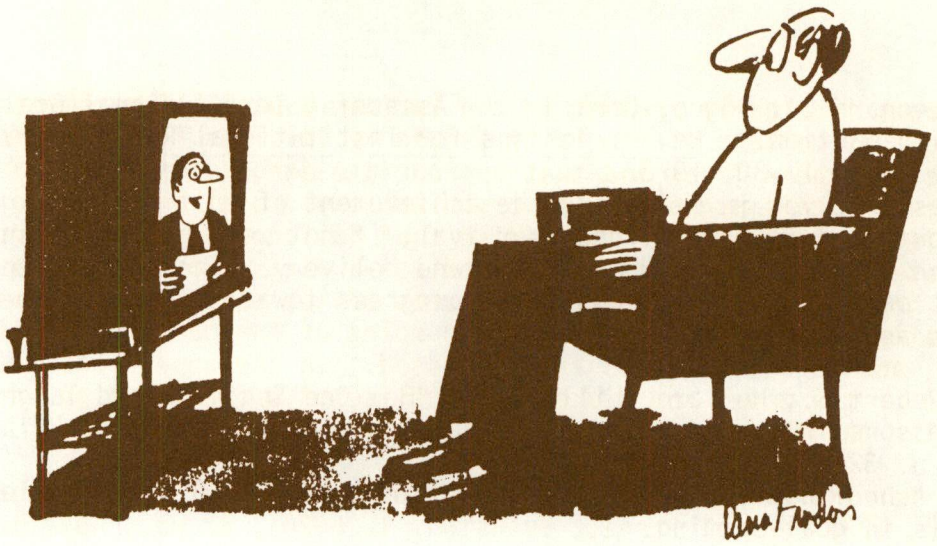
Romney, Leonard C.; Bogen, Gerald K. "Assessing Institutional Goals: Proceed with Caution." New Directions for Institutional Research, Volume 5, No. 3, pp. 17-30, 1978.
Issues involved in measuring the achievement of institutional goals are outlined. Institutional survival, if not well-being, is shown to depend on symmetry between intent and delivery. The latter depends at least partially upon demonstrated progress toward the achievement of goals and community expectations.

Tapply, Robert S.; Hollard, William R. "How One School Board Taught Itself Some Lessons in Leadership." American School Board Journal, Volume 164, No. 9, p. 32, September 1977.
This school board put itself through an inservice program to learn new skills in goal-setting.

Tymko, J. Lawrence. "A Framework for Policy Making." Paper presented at the Canadian School Trustees' Assocation Congress on Education (1st, Toronto, Ontario, June 17-21, 1978), 27 pp., 1978.
To prevent policy-making from being fragmented into a series of ad hoc and disjointed sessions, it is important to be as clear as possible about the policy-making framework within which decision-making is to operate. School boards that aspire toward enhancing their policy-making function are here provided with a basic structure for policy-making. Policy-making means setting the general direction in which the school system charts its course, and the manner in which the schools are to be operated. The policy-making framework presented here is a six-step process that involves answering several questions: 1) What ought to be? 2) What is the current state of affairs? 3) What is the problem? 4) What are the alternative solutions? 5) What shall be the policy? 6) What are the results of the policy? The first question involves the consideration of values, a consideration vital to policy-making because of values' influence on aspirations, goals, and perception of reality. Determining the difference between the answer to question one and the answer to question two constitutes needs assessment. Question six is vital, because policy evaluation is necessary to correct policy malfunction.

Warner, Rawleigh, Jr. "This Board Chairman (of Mobil Oil Corporation) Says: Manage by Objectives." Executive Education, Volume 1, No. 11, pp. 30-31, November 1979.
The author outlines the management by objectives system used by Mobil Oil and argues for its advantages over conventional management approaches.





"Meaningless statistics were up one-point-five per cent this month over last month."

C. Pamphlets and Manuals

Anderson, Ellen, Ed. Policymaking: A Challenge for School Board Members. Texas Association of School Boards, Austin, TX, 60 pp., 1976.
This booklet consists of seven articles intended to introduce new school board members in Texas to the formation and implementation of educational policy, with particular emphasis on the legal requirements governing policy-making and other school board activities. The articles included are the following: "Policy Development: An Overview," by Richard L. Hooker; "School Board Member Liability," by Lanier Cox; "Wood v. Strickland: An Analysis," by G. Ross Smith; "Hard Choices in School Discipline," by Arthur A. Kola; "Corporal Punishment: Update 1976," by Kelly Frels; "Exclusivity v. Individual Rights," by Ellen Anderson; and "School/Community Relations," by Larry Ascough.

Camp Fire Girls, Inc. Administration. Guideline Series 1. Camp Fire Girls, Inc., 1740 Broadway, New York, NY 10019, 1970. Cat. No. D-262.
Planning and evaluation as functions of the Local Council of Camp Fire Girls are treated clearly in this short training manual. The appendix contains a large collection of sample forms for gauging the level of membership, council effectiveness, and the community's needs.

Federation of Protestant Welfare Agencies, Inc. Manual of Forms and Procedures for Use by Homes for the Aged. Federation of Protestant Welfare Agencies, Inc., 281 Park Avenue South, New York, NY 10010, 6 pp., 1963.
A formal statement of policy on the responsibilities of boards, officers, and committees and of their relations to the administrator and to the staff.

Harper, Mary-Angela. Putting It All Together: A Model for Parish Educational Policymaking. Second edition. Publication Sales, National Catholic Educational Association, One Dupont Circle, Suite 350, Washington, DC 20036, 35 pp., 1979.
The rationale of shared responsibility by the hierarchy and the laity for directing Catholic school and non-school religious educational

programs is clearly present in the Vatican Council II documents, which state that members of the laity should be involved in all decisions affecting their lives and that appropriate structures should be established for this purpose. The organizational model proposed in this booklet is designed for the parish that has enough parishioners to compose two major policy-making bodies--a parish council and an education board. Organizational structures of the parish council and an education board are explained. The roles of the pastor, administrators, and parents' groups are discussed. In the appendices are graphics of the model and a skeletal outline of a constitution and by-laws for the parish council and education board.

Policies for Improving School Board Meetings. National School Boards Association, 1233 Central Street, Evanston, IL 60201, 32 pp., November 1970. Catalog No. 70-55.

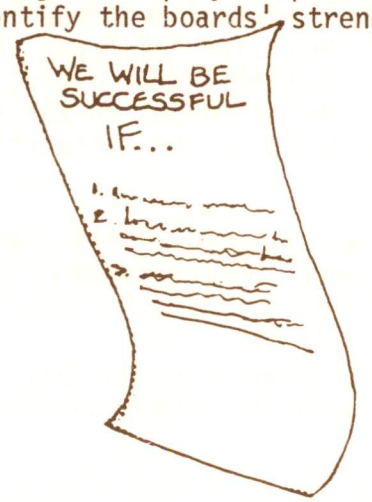
This School Board Policy Development Kit, prepared by the Educational Policies Service/NSBA Policy Information Clearinghouse is concerned with the written policies that are necessary to facilitate more effective meeting procedures. In conjunction with a discussion of ways to improve board meetings, a checklist is provided as an instrument for self-evaluation by school boards. Samples are provided for demonstration purposes; these concern the duties of the board president, the board secretary, board parliamentarian, and board members, as well as new board member orientation, school board meetings, board meeting procedures, board meeting preparation, broadcasting and taping of board meetings, review of board procedures, criteria for evaluating board meetings, and agendas. In addition, text of a hand-out leaflet prepared for the Milwaukee Board of School Directors is given as an example of the kind of welcome a board should extend its visitors. Three publications concerned with school board meetings are recommended, and a brief precis is given of each, together with ordering information.

Trecker, Harleigh B. Guide for Agency Self-Appraisal. Division on Group Work and Youth Services, Federation of Protestant Welfare Agencies, Inc., 281 Park Avenue South, New York, NY 10010.

A series of questionnaires covering in detail every possible aspect of the agency's structure and function. The questions are to be answered by groups of Board Members and Staff, and the process of providing the correct answers is in itself an educational experience.

Wortham, Carol J. How We See Ourselves. Department of Mental Health and Developmental Disabilities, Region 5, State of Illinois.

This 37 page brochure goes through a step by step evaluation of their boards. It is designed to identify the boards' strengths and weaknesses.



VII. Board-Employee Relationships

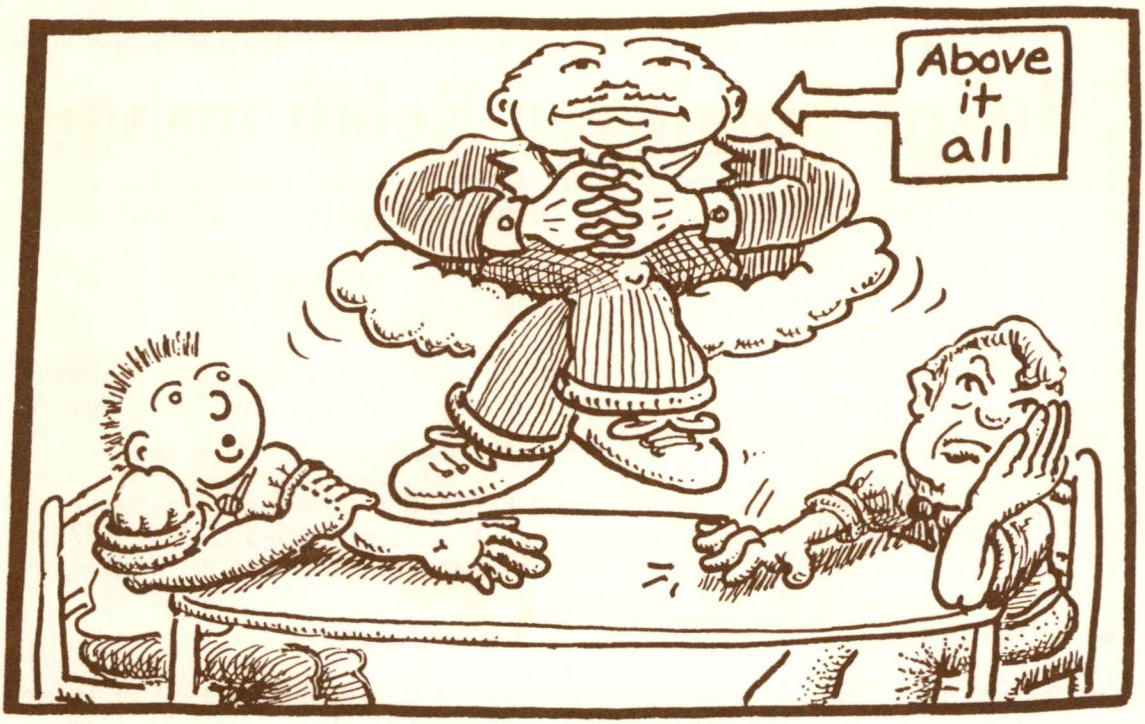


"Am I to assume that you are not in complete accord with my counter offer?"

A. Books

Metzler, John H. Collective Negotiations. What Every School Board Member Should Know. New Jersey School Boards Association, 383 West State Street, P.O. Box 909, Trenton, NJ 08605, 188 pp., 1975.

The intent of this volume is to inform boards of education about the collective negotiations process so that the board can proceed to improve board-staff relations as well as achieve its goals at the bargaining table. Although much of the information in the book applies to all public employee collective bargaining, the author chooses to focus on teachers' unions and their interaction with the negotiating team of the school board. Metzler describes the bargaining process, focusing on negotating teams, bargaining techniques, communication during bargaining, and negotiability. The book also includes chapters on grievance procedures, mediation, strikes, arbitration, and fact-finding. A specific analysis of New Jersey labor legislation governing public employee bargaining is appended, along with the text of the New Jersey Employer-Employee Relations Act and relevant court cases. A glossary of collective bargaining terms is also included.



B. Papers and Journal Articles

American School Board Journal. "Fifteen Tricks that Teacher Unions Play on School Boards" American School Board Journal, Vol. 164, No. 7, pp. 23, July 1977.
Tactics teachers can use to disrupt the board during collective bargaining.

Bender, Robert H. "Before You Make a Reduction in Force, Be Sure to Pass a Policy that Contains These Elements." American School Board Journal, Volume 167, No. 3, pp. 38-39, March 1980.
Based on a survey of reduction-in-force (RIF) policies in effect in Virginia, a checklist of elements that a school board policy on RIF should include is presented.

Downey, Gregg W.; Mullins, Carolyn. "Where School Boards Do Everything--Even Bargain--In Public View." American School Board Journal, Volume 163, No. 9, pp. 31-35, September 1976.

Glime, Raymond G. "How to Use Collective Bargaining to Increase Your Board's Authority." American School Board Journal, Volume 165, No. 3, pp. 46, 48, March 1978.

Jones, Philip G. "Should the Public Join You and Your Teachers at the Bargaining Table?" American School Board Journal, Volume 162, No. 9, pp. 27-31, September 1975.

Lieberman, Myron. "How to Plug the Leak from Your School Board to the Teacher Union." American School Board Journal, Volume 165, No. 5, pp. 31, 45, May 1978.
Suggests steps that can be taken if a board member or anyone close to the board has ties with the teacher union and may supply the union with information about the board's position at bargaining time.

_____. "Tight Policies Prevent Loose Bargains." Updating School Board Policies, Volume 9, No. 7-8, pp. 6-7, July-August 1978.
A district about to bargain for the first time should perform a comprehensive review and revision of board policies before it begins to bargain. Once a union is recognized, a board cannot make unilateral decisions to change its policies on terms and conditions of employment.

_____. "When Teachers Strike: It's How You Play the Game that Decides Who Wins." Updating School Board Policies, Volume 9, No. 10, pp. 1-3, 5, October 1978.
The board of education must be willing to delegate authority to administrators. Examines some of the reasons why policies developed before a strike often don't work during a strike.

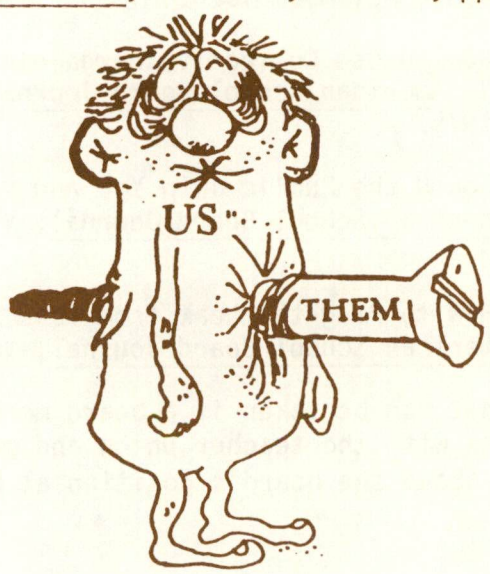
_____. "Why Smart School Boards Keep Hands Off Grievance Procedures." American School Board Journal, Volume 162, No. 7, pp. 29-31, July 1975.
The board of education's role is to formulate policy, not to administer it. The process of deciding grievance cases is plainly policy administration.

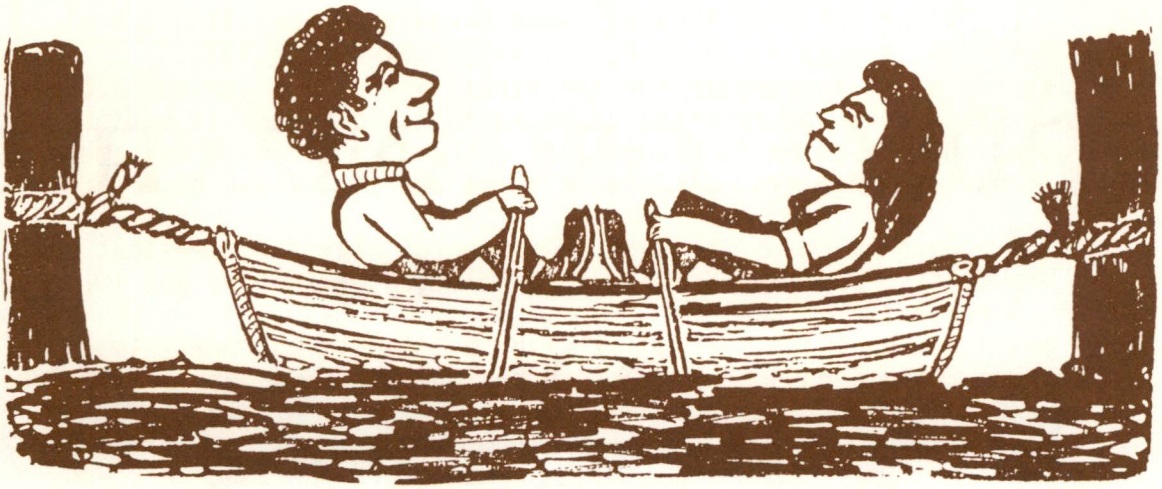
Medcalf, Robert L. "Pour Oil on Strike-Troubled Waters by Following These Steps." American School Board Journal, Volume 167, No. 3, p. 40, March 1980.
Outlines what board members should and should not do during a strike in order to smooth the transition back to normal after the strike.

Shapiro, Arthur; Nicaud, Robert. "Recognize the Phases of a School Strike and Use This Knowledge to Avoid Trouble." American School Board Journal, Volume 167, No. 7, pp. 28-29, July 1980.
Outlines the four stages of a teacher strike (individual complaints become group dissatisfaction, general dissatisfaction increases union militancy, increased militancy is expressed through job actions and a strike, and cooling off occurs) and suggests ways in which an understanding of these phases can aid a board.

Thompson, Margery. "Strikes Bring Out the Worst in Most People and Bring it Right into the Homes and Offices of Unprepared Board Members." American School Board Journal, Volume 166, No. 10, pp. 34-36, October 1979.
Outlines some of the pressures board members can be under during a teacher strike.

"Enlightened Boards Don't Keep the Public in the Dark When They Bargain." Updating School Board Policies, Volume 9, No. 7-8, pp. 4-5, 11, July-August 1978.





C. Pamphlets and Manuals

Bailey, Max A.; Booth, Ronald R. Collective Bargaining and the School Board Member. IASB Publications, 220 Iles Park Place, Springfield, IL 62718, 63 pp., 1978.

School Boards must recognize that bargaining with unionized teachers is becoming inevitable. Attempts to postpone formal negotiation usually result in giving away more by accident than would have been the case in the formal situation. While it is true that formal bargaining involves an adversary relationship between school boards and teachers, serious conflict is most easily avoided if both sides prepare seriously and recognize the realities of the process, including the fact that the process deals not only with the needs of teachers as individuals, but with their needs as a group. As the public's representative in the negotiation process, the school board has a responsibility to limit the scope of the negotiations as much as possible. To this end the board relies on its credibility in the community as a source of strength. The union finds its strength not only in the board's failure of credibility, but in emotional confrontation with a board that is neither prepared for nor willing to bargain seriously.

Camp Fire Girls, Inc. Personnel: Developing Personnel Policies and Practices. Camp Fire Girls, Guideline Series 1, New York, 1972. (Catalog No. D-278.

Recommended procedures and forms for personnel practices, but neither statistics nor salary scales are included.

National Federation of Settlements and Neighborhood Centers. Recommended Job Classifications and Salary Standards. 1969. (Order #950-69-1.)

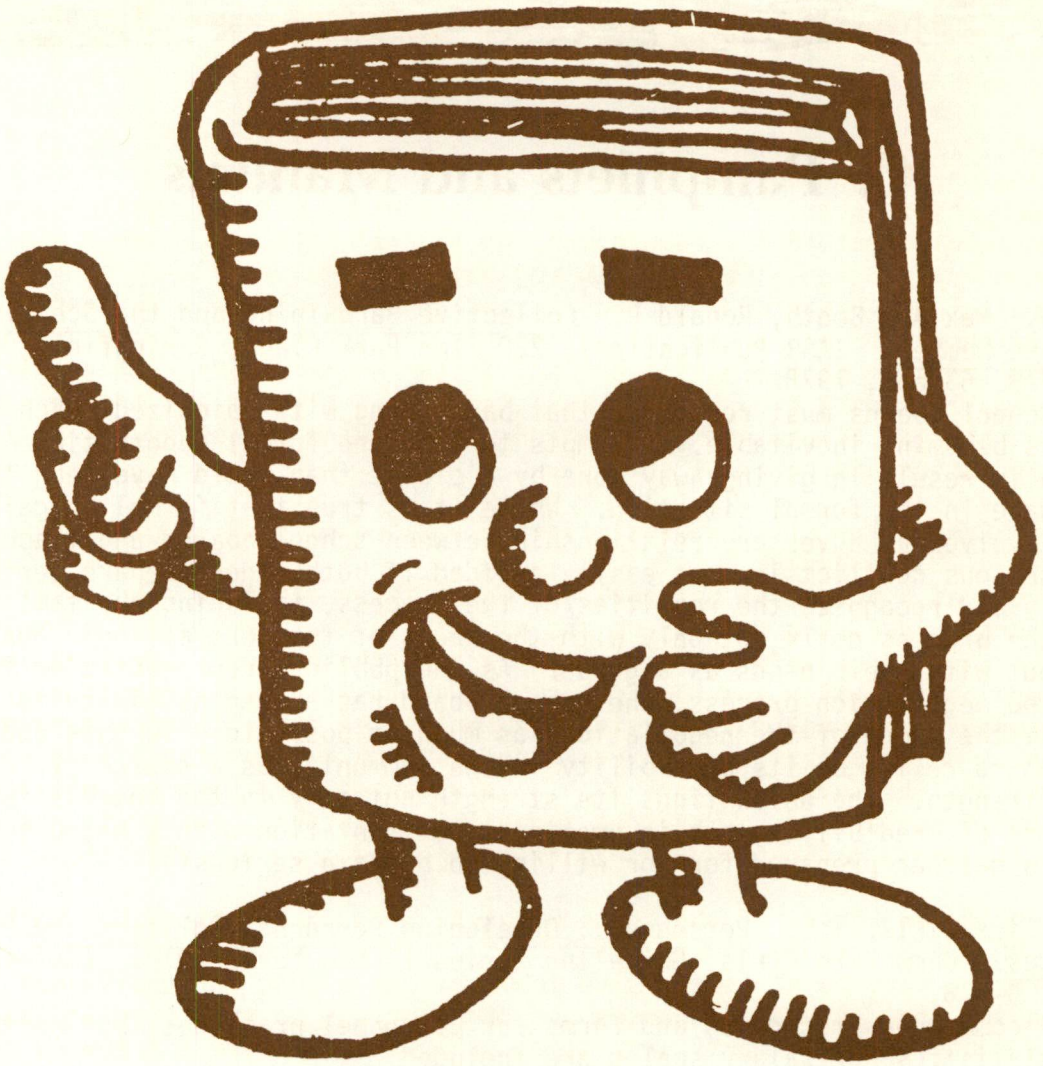
Job descriptions with minimum qualifications, minimum starting salaries in relation to various basic core budgets. Recommendations are based on an annual review of salary trends in member organizations.

_____. Recommended Personnel Practices. 1968. (Order #950-62-2.)

This is a guide for settlements and neighborhood centers for developing their own personnel patterns. It covers in detail the Personnel Committee, employment procedures, working conditions, separation of staff, hours of work and leave, insurance, grievance procedures, and union affiliation.

6

RESOURCE ORGANIZATIONS AND OTHER BIBLIOGRAPHIES



Citizen Involvement Training Program. 225 School of Education, University of Massachusetts, Amherst, MA 01003. (413) 545-2038.

Citizen Involvement Training Project provides workshops, training materials, and consulting aimed at increasing the effectiveness of citizen groups. CITP began in 1976 under a grant from the W.K. Kellogg Foundation and has served more than 500 organizations since then.

Building Better Boards. American Association of Community and Junior Colleges. One DuPont Circle, N.W., Suite 410, Washington, DC 20036. (202) 293-2050.

Begun in 1980 with help from a Kellogg Foundation grant, the BBB program is developing a resource center and training network for citizen boards and councils through community and junior colleges throughout the nation. It also helped publish this bibliography.

National Citizen Participation Council. 1620 Eye Street, N.W., Suite 517, Washington, DC 20006. (202) 293-7351.

A nonprofit organization dedicated to promoting citizen participation and involvement in the development of federal policy for urban and community program. Operates 10 regional centers which geographically parallel the Department of Housing and Urban Development regions. Services include: technical assistance and training to regional and local citizen participation gruops; including information on specific federally funded programs and assistance in analyzing and interpreting federal regulations and legislations. Maintains a library and citizen information and referral service.

National Center for Citizen Participation. P.O. Box 4179, Boulder, CO 80302. (303) 447-0492.

Serves as a principal national source of information on successful programs involving volunteers and assists in the development of volunteer service centers in communities around the nation. Services include consultation and the collection, analysis and distribution of information on various aspects of volunteering and volunteer management. An organization also concerned with maximizing the effectiveness of, and involving more people in volunteer programs and citizen involvement efforts. Provides technical assistance, information services, consultation, leadership training, and program evaluation.

League of Women Voters of the United States. 1730 M Street, N.W., Washington, DC 20036. (202) 296-1770.

Offers a variety of inexpensive publications around various issues ranging from natural resources and urban crises to public relations and money-making. Facts and issues publications present a review of the pros and cons of various issues. A variety of community action guides--chiefly how-to-do-it handbooks--are also available.

Institute for Responsive Education. 775 Commonwealth Avenue, Boston, MA 02215.

Publications and assistance especially directed toward citizens working toward better and more responsive schools.

Community Action Training. 128 West State Street, Trenton, NJ 08608. (609) 393-3746.

A private corporation whose purpose is to assist public agencies in training their employees for maximum performance. Types of training range from organizational development to basic offic skills. Have a variety of low-cost, self-study publications.

Institute for Local Self-Reliance. 1717 18th Street, N.W., Washington, DC 20009. (202) 232-4108.

Established to investigate the technical feasibility of community self-reliance in urban areas. Provides technical assistance to municipalities and community organizations in areas of municipal waste management, municipal finance, urban energy resources, urban food production, and community housing.

The National Self-Help Resource Center. 2000 S Street, N.W., Washington, DC 20009. (202) 338-5704.

The National Self-Help Resource Center is seeking to build linkages between local self-help initiatives willing to aid in the development of a cooperative exchange of information and resources. Serves a national network of community resource centers and related organizations through the National CRC (Community Resource Center) with information resources, publications, technical assistance, consultation and training.

National Training and Information Center. 121 W. Superior Street, Chicago, IL 60610. (312) 751-1601.

Provides technical assistance, training, information, and consultation for community groups who are organizing to determine the future of their communities.

The Urban Institute. 2100 M Street, N.W., Washington, DC 20037.

An independent, nonpartisan, nonprofit research organization. Its free Publications Catalog lists the Institute's research reports and interpretive essays in such areas as policy analysis, program evaluation, transportation, health, land use, housing, urban public finance, criminal justice, and urban economic development.

Support Center. 1424 16th Street, N.W., Washington, DC 20036. (202) 256-2443.

Seeks to increase the effectiveness of nonprofit public interest organizations. Some of their services include help in the areas of financial and office management, management systems, management planning, personnel (including volunteers), and communications and financial development. Also performs organizational audits and short "check-ups."

Urban Planning Aid, Inc., Room 305, 2 Park Square, Boston, MA 02116. (617) 482-6695.

Provides technical assistance and resource materials to low-income groups seeking to improve their working and living conditions. Aim is to provide back-up support. Focus is on health and safety, media use, research (social, political, and economic questions) and housing.

OTHER BIBLIOGRAPHIES

Citizen Participation in Transportation Planning: A Selected Bibliography. Yukobousky, Richard. N.Y. State Department of Transportation in cooperation with the U.S. Department of Transportation, 1973, 55 pp., Available from U.S. DOT, Federal Highway Administration, Office of Highway Planning, Washington, DC 20590, Free.

The literature review section considers the goals and desirability of citizen participation and the characteristics of persons likely to participate in the political process and in voluntary organizations. The bibliography is selectively annotated and has sections on planning participation, political participation, community interaction techniques, citizen participation in transportation planning and other government programs, and a section on other bibliographies.

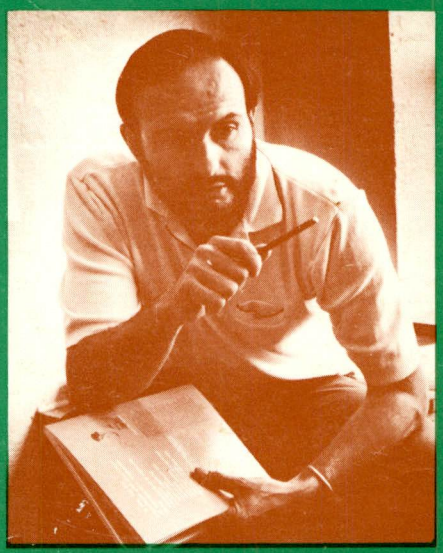
Exchange Bibliography Series. Council of Planning Librarians, P.O. Box 229, Monticello, IL 61856.

The series covers a wide range of planning and public policy topics. They are available in many libraries. Several pertain to citizen involvement.

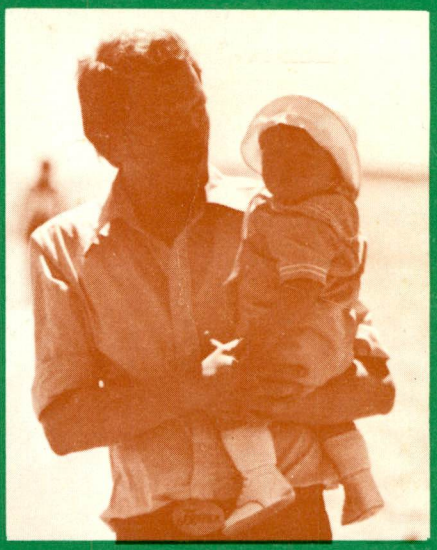
Rural Development Literature. (Annotated bibliography 1969-1975) Southern Rural Development Center, 1976, 81 pp.. Available from the Rural Development Service, USDA, Washington, DC 20250, Free.

A starting point in obtaining literature and information for program design and implementation. There are seven subject areas which include fire and emergency services, health care delivery, manpower training/vocational education, and rural housing. Also tells how to obtain the publications from lending libraries and how to get photocopies.

About the Authors



Dave Magnani founded the Ashland (Mass.) Educational Community Center and was Project Coordinator for the Citizen Involvement Training Project for six years. Dr. Magnani is an Assistant Professor of Community Education at the University of Massachusetts. He has served as Principal Investigator for major projects involving the development of boards and councils including the Mott Foundation's "Community Education for Community Self-Development" project which strengthened seven community development corporations. He was Project Director for the Kellogg Foundation's "Extension to Citizenship" project which helped the Cooperative Extension Service develop its citizen training group training skills. He is co-author of *Beyond Experts: A Guide for Citizen Group Training* and has consulted with numerous profit and non-profit organizations. Currently, Dave is consultant to the American Association of Community and Junior Colleges' "Building Better Boards" program.



Newell McMurtry has a M.S. in Human Nutrition from the University of Massachusetts/Amherst, and received his B.S. from Virginia Polytechnic Institute and State University. He has a long family and personal history of work with the Cooperative Extension Service and enjoys any work that deals with groups of people. As a research assistant at CITP he has developed a keen interest in citizen participation in the political process. Newell is a father, a foster-parent, a lay minister, worked two years in Germany as a missionary and sits on the Advisory Board of a local social service agency. Through these varied experiences he has learned first-hand of some of the problems facing boards, councils, and groups in general. His greatest accomplishments and gratifications come from his role of husband and father.

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