

**Tennessee Department of Education  
School Board Academy**

**LOCAL OPTION FOR CREDIT**

**Request and Guidelines**

Christina Meeks  
TN Department of Education  
Senior Director of Regional Support  
Christina.Meeks@tn.gov

# Contents

## **Local Option Credit Request Form**

Request	2
Content Information	3-4

## **Guidelines**

Criteria for Training and Professional Development	5
Approvable and Non-Approvable Activities	6
Responsibilities of Program Coordinator and Contact Person	7
Standards for School Board Training	8-12

## **Attachments**

Action Planning Outline	13
Implementation Checklist	14

**Tennessee School Board Academy  
Local Option for Credit Request**

School System: \_\_\_\_\_

If more than one school system is involved, list the contact person for the collaborative effort and the individual contacts for each school system.

Contact Person: \_\_\_\_\_

Telephone: \_\_\_\_\_

Program Coordinator: \_\_\_\_\_

Telephone: \_\_\_\_\_

Superintendent or Executive Director Signature: \_\_\_\_\_

List the title of each event and total number of hours per event:

<u>Event Title</u>	<u>Total Hours</u>

## **Request: Program Content Information**

1. Identify the professional development goals of the program. The goals must relate to one or more of the School Board Competencies in the attached guidelines.
2. Identify the relationship of the program goals to school system goals and the Master Plan for Tennessee Schools: ([https://www.tn.gov/content/dam/tn/the/cm/2015/sum15I.D.\\_2015-20\\_Master\\_Plan\\_for\\_Tennessee\\_Higher\\_Education.pdf](https://www.tn.gov/content/dam/tn/the/cm/2015/sum15I.D._2015-20_Master_Plan_for_Tennessee_Higher_Education.pdf)).
3. List specific objectives to be accomplished by the program.
4. Outline the content of the program activities.



# Tennessee School Board Academy

## Local Option for Credit Guidelines

### Criteria for Training and Professional Development

#### **Planning:**

- There should be clearly stated goals and objectives for each program including the information/knowledge or skill that participants should receive.
- Objectives should be clearly related to meeting overall goals of the program and school system.
- The content of activities should be based on meeting identified needs and/or continuing levels of growth specific to the local school system or individuals.
- Content, delivery and evaluation should be based on sound research about adult learning and development.
- Plans should be made to ensure the environment/place of the program event(s) provides the necessary resources required for the organized activities.

#### **Implementation:**

- Participants can complete up to seven (7) hours of SBA Optional Credit each year after completing Orientation and required SBA core modules.
- Local Option Credit Modules are ineligible for stipend reimbursement.
- Registering for SBA Optional Credit or Local Option Credit is at the discretion of each individual school board member.
- Program delivery will occur within an adequate time frame to allow participants to learn content, observe and practice new knowledge and skills, and reflect on the learning experience.
- Implementation of programs will allow for group bonding activities and building effective collegial relationships and networks.
- All programs will have adequate follow-up such as action planning, on-going support groups, mentor or observer feedback, and/or connection to higher level training.
- All programs will maintain adequate records of participation, evaluation and follow-up.
- All program events will be at least a minimum of seven (7) contact hours delivered in one continuous session or no more than two sessions.

#### **Evaluation:**

- All evaluation will reflect the expectation that the activity will result in school system improvement and/or improved board member skills. Evaluation measures should focus on how the learning is applied.
- All evaluation will provide feedback for future planning.
- Evaluation instruments for activities will be simple to complete and easily understood.
- Evaluation of an activity will evaluate the presenter, the content itself and the delivery, and will demonstrate a linkage to measurable program objectives and follow-up action by participants.
- Evaluation results will be tabulated, and results reported to the Tennessee School Board Academy (SBA), TN Department of Education Executive Administrative Assistant, Office of Academics.

## **Approvable and Non-Approvable Activities**

Activities for a Local Option Credit Program should not include regular board member responsibilities.

### **Examples of Approvable Training and Professional Development Activities/Topics:**

- Team building and effective policy leadership
- Restructuring for instructional improvement
- Using data to make decisions
- Strategic and school improvement planning
- Policy and program development
- School safety planning
- Leadership Institute for School Board Members (state or nationally recognized)

### **Examples of Non-Approvable Activities:**

- Program updates
- Board meetings, staff meetings, departmental meetings
- State and federal regulations updates
- Textbook or curriculum evaluation committees
- School visits or parent/teacher meetings
- Team, project, or sub-committee meetings
- Courses for college credit
- Professional organization meetings or conferences
- Regularly scheduled in-service training

## **Responsibilities of Coordinator and Contact Person**

One person may be identified to serve as both coordinator and contact.

### **Responsibilities of The Program Coordinator:**

- Designing the program content including planning, implementation and follow-up
- Obtaining speakers and presenters
- Obtaining a place for the event(s)
- Scheduling the event(s) on school system calendar
- Scheduling the agenda for the event(s)
- Obtaining materials, supplies, and equipment
- Communicating about the program to board members in all participating school systems if part of a consortium, regional or statewide effort
- Registering participants
- Conducting the actual event(s)
- Serving as a general “trouble shooter”
- Implementing the program evaluation

### **Responsibilities of The Contact Person:**

- Serving as the contact person for the Tennessee School Board Academy (SBA), TN Department of Education Executive Administrative Assistant, Office of Academics when information regarding the program is needed
- Completing the request for Local Option Credit and submitting it to the TN Department of Education Executive Administrative Assistant, Office of Academics
- Communicating/coordinating with all participating school systems/organizations, if the approved program activities are part of a consortium, regional or statewide effort
- Keeping accurate attendance records and reporting them to the TN Department of Education Executive Administrative Assistant, Office of Academics and the TSBA Registrar within 30 days of completion of the event(s)
- Completing and submitting the program evaluation summary and final report to the TN Department of Education Executive Administrative Assistant, Office of Academics and the TSBA Registrar



## School Board Competencies

### Knowledge:

- National, state and district goals for educational programs and expected results
- How financial resources can affect educational results
- The state's role in instruction
- National, state and district programs for special programs
- Educational trends
- The purpose of accountability assessment, different types of assessments, indicators of effectiveness and how assessment results are interpreted and used
- The emphasis of the board's time and energy is education and educational results
- The role and function of the school board, the board chairman and other board officers
- The board's statutory duties and responsibilities
- Effective board meeting management
- The structure of public-school education and the role of the local school board in that structure
- The impact of verbal and nonverbal communication during board meetings
- Policy regarding the role and authority of the board and in governing district operations
- The problem-solving and decision-making process
- The role and responsibilities of an effective superintendent
- The board, staff, and community expectations for the superintendent
- The steps in the process and the resources available for hiring, performance evaluation, and for the possible dismissal of a superintendent
- The importance of the interrelationship between the boards and the superintendent's role
- The fiscal impact of tax rates and debt service on the school district's financial condition and the community's ability to fund public education
- The respective roles and responsibilities of the board and the administration in the budget process
- Statutory rules and regulation regarding conflict of interest
- The budget cycle and the relationship of the budget to district goals
- Statutory rules and regulations regarding the budget
- The short-term and long-range implications of financial decisions
- The bidding and purchasing process
- The sources and proportion of revenue: local, state, and federal
- The budget
- The legal authority of the superintendent and the board chairman as related to school finance
- The rule and responsibility of the board regarding the auditor and the audit review process
- The responsibilities and limitations of serving as an elected public official
- How to attract and retain effective employees
- How to establish policy to govern policy making and oversight
- How to invest in board development that addresses the needs of individual board members and the board as a whole
- The role of the local board member as an advocate for the school district
- The role of the State Board of Education and the Tennessee Department of Education
- Current public policy issues, topics and trends in education
- The contract cycle and laws governing contractual relationships
- The role of local, state, regional and national associations, as well as special interest groups, and their involvement in the legislative process
- Effective advocacy techniques of discussing educational issues with appropriate officials
- State law concerning board and administrative roles in the employment and assignment of personnel
- The basic principles of an equitable and effective compensation system

- Legal issues and effective practices regarding personnel appraisal
- The benefits of an effective staff development program
- The concept of school facilities
- The impact of change on the educational system
- The essential elements of a district's planning process
- The board's role in monitoring accountability measures
- The importance of community, staff, and student involvement in goal setting and planning
- The appropriate role of the superintendent and board in goal setting and planning toward improved student results
- The relationship of laws and regulations to education and special education
- The role of policy in governing district operations
- The difference between legally mandated and locally determined policy
- The importance of policy development and review
- The difference between board policy and administrative practice
- The importance of the district's extracurricular activities and the board policies governing them
- The importance of monitoring innovations, their implementation and evaluation
- The role as a representative of the entire community
- The policies that govern working relationships with the community such as public participation at board meetings
- The role of the board as an advocate for the students to the community
- The role of the board in facilities planning and maintenance
- The issues relating to community use of school facilities
- The process for selecting and hiring professional services
- The impact of educational specifications on facility design
- The implications of nontraditional building usage
- The trends of facility utilization
- Financial decisions and their relation to the life-cycle cost of school facilities
- The basic sources of school law
- Legal obligations regarding a board member's personal conduct and responsibility
- The importance of acting as a corporate body
- The board's legal obligations regarding students
- The importance of demographic information

**Skills:**

- Promotes success for all students
- Supports the provision of resources for effective instruction
- Asks appropriate questions about the instructional program and school activities
- Acknowledges student success and achievement
- Strives for equity and equal opportunity for all students
- Supports the district's primary teaching mission
- Serves as a liaison for schools to the community
- Considers student performance the highest priority of the educational organization
- Is prepared for all meetings
- Communicates information effectively and appropriately
- Analyzes periodic reports to make decisions about building maintenance
- Participates in an annual board self-evaluation for self-development
- Communicates effectively and appropriately
- Manages agreement and disagreement
- Uses a problem-solving and decision-making process
- Demonstrates an understanding of and follows the parliamentary procedures adopted by the board and/or Robert's Rules of Order
- Handles matters before the board consistent with district goals, priorities, and established policies
- Attends conferences and conventions to become informed
- Reviews policy updates prior to board adoption
- Commits time and energy to the board of education
- Works with the board and the superintendent in defining expectations for the superintendent and develops an appropriate process for evaluating the superintendent's performance
- Delegates administrative tasks and authority to the superintendent and supports him/her in that role
- Works with other board members to recruit and hire an appropriate superintendent for the district
- Brings concerns to the superintendent or board chairman in an appropriate and timely manner
- Works with other members of the board in establishing budget guidelines for administration, adopting the budget, and setting a tax rate, if applicable
- Participates in setting district goals and establishes the district's financial priorities based on those goals
- Participates with other members of the board when communicating financial issues effectively to the community
- Participates with other members of the board in ensuring that an effective budget management system exist
- Asks appropriate questions regarding fiscal issues and budget recommendations
- Analyzes the adequacy of financial resources in meeting the district's priorities
- Reviews audit reports and acts upon the recommendations to ensure the district is managed in a fiscally sound manner
- Asks appropriate questions regarding facilities, their plans and construction projects and analyzes recommendations concerning them
- Recognizes the importance of demographic information in anticipation of district needs
- Works with the funding body to ensure adequate resources
- Participates in the process of educating the community on educational issues and the legislative process
- Serves as an advocate for public education
- Discusses education issues with the superintendent, appropriate staff, and other board members; represents the district's position to local state and federal officials as appropriate
- Communicates effectively and appropriately with the community and the media about school issues
- Follows established board policies when approached by an employee

- Works with the superintendent and other board members in setting appropriate goals and priorities regarding district personnel
- Asks clarifying questions about the district's personnel needs, the district's hiring process, and the district's organization and management structure
- Provides a supportive atmosphere to attract and retain effective personnel
- Supports the fair and consistent application of personnel policies
- Supports an effective staff development program
- Asks clarifying questions about the district's performance appraisal systems and programs
- Periodically reviews personnel policies to ensure appropriateness and compatibility
- Acquires appropriate information for planning
- Compares the current district and community situations to desired results
- Provides for community involvement through effective communication
- Advocates policies and resources to support goals
- Participates in the development and assessment of long-range goals and their expected results
- Uses the district's goals in establishing the budget, instructional program, and board policies
- Uses the Board's policy to guide and explain the actions of the board
- Educates community members and school staff about the role of an individual board member
- Participates in the development of effective policies
- Distinguishes between legal mandates, locally initiated policies, and administrative regulations
- Recognizes and suggests incompatibilities be corrected between policy and practice
- Sees that policies are reviewed and updated regularly
- Builds and maintains a supportive relationship with the community
- Reviews and explains local policy on community use of school facilities
- Works with the superintendent and other members of the board in keeping all members of the community informed about and involved in the school district's programs
- Ensures that community wishes and concerns are heard by appropriate officials
- Assures a psychologically and physically safe environment for all students
- Promotes a comprehensive guidance program for all students
- Values and affirms the work of others
- Participates at each level of the legislative process to ensure the district's point of view is heard and received
- Withholds judgment in employee disputes until all evidence is heard
- Adopts innovations that are best for this particular district

**Attitudes:**

- Values an equitable and quality education for each student
- Appreciates the importance of individual student self-esteem
- Believes that student success is related to effective teaching
- Values a position of public trust, responsive to students' needs, and accountable to the community
- Values the opinions and experiences of others

# **Tennessee School Board Academy**

## **Action Plan Outline**

The purpose of this tool is to assist participants in planning follow-up action. Participants complete individually using the knowledge skills and attributes addressed in the training. Group discussion follows. The group creates one action plan, based on the input of all, for systematic follow-up and implementation.

- I. Identify target areas and objectives for school system improvement
  
  
  
  
  
  
  
  
  
  
- II. Identify action steps and strategies designed to achieve improvement objectives
  
  
  
  
  
  
  
  
  
  
- III. Suggested time frame to complete action steps
  
  
  
  
  
  
  
  
  
  
- IV. Person(s) responsible for leading/coordinating the work to achieve the action steps
  
  
  
  
  
  
  
  
  
  
- V. Others to be involved
  
  
  
  
  
  
  
  
  
  
- VI. Means of evaluating the accomplishment and effectiveness of the action steps
  
  
  
  
  
  
  
  
  
  
- VII. Process for sustaining the commitment to continuous improvement



## SBA/Local Option Credit Implementation Checklist

A checklist to assist contact persons and program coordinators in planning, conducting, evaluating and reporting Tennessee School Board Academy Local Option Credit program activities

- \_\_\_\_\_ 1. Contact person and program coordinator identified
- \_\_\_\_\_ 2. Objectives for event(s) are tied to needs assessment and plans (examples: school system plans, performance data, any existing assessment information)
- \_\_\_\_\_ 3. Superintendent(s) and/or Board Chairs notified of the event(s)
- \_\_\_\_\_ 4. Agenda planned to allow participants time to learn content, to network with each other and to discuss follow-up plans
- \_\_\_\_\_ 5. Program design completed
  - \_\_\_\_\_ objective(s) defined
  - \_\_\_\_\_ consultant(s) located
  - \_\_\_\_\_ content and deliver based on sound research about adult learning and development
  - \_\_\_\_\_ plans made for follow up
- \_\_\_\_\_ 6. Funds allocated for consultant fees, facilities, food, transportation, supplies, gratuities, etc.
- \_\_\_\_\_ 7. A place for the event(s) secured
  - \_\_\_\_\_ adequate space
  - \_\_\_\_\_ cancellation policy/procedure established
  - \_\_\_\_\_ room set up consistent with session objectives
  - \_\_\_\_\_ accommodations for participants with special needs
  - \_\_\_\_\_ considerations such as temperature, lighting, acoustics, furnishings, electrical outlets
  - \_\_\_\_\_ arrangements for appropriate AV equipment
- \_\_\_\_\_ 8. Plan for evaluating the program that provides feedback for future planning
- \_\_\_\_\_ 9. Resources and supplies collected and organized
- \_\_\_\_\_ 10. Arrangements made for clerical assistance
- \_\_\_\_\_ 11. Provisions made for hospitality
  - \_\_\_\_\_ registration and sign-in planned
  - \_\_\_\_\_ regular breaks scheduled
  - \_\_\_\_\_ snacks/meals arranged
- \_\_\_\_\_ 12. Plans made to advertise the professional development opportunity to potential participants in all participating school systems
- \_\_\_\_\_ 13. Back-up plans made that allow for AV problems, weather, illness, time flexibility, etc.

- \_\_\_\_\_ 14. Clear directions to the site and information about accommodations communicated to all participants
- \_\_\_\_\_ 15. Return to TN Department of Education Executive Administrative Assistant, Office of Academics and the TSBA Registrar:  
\_\_\_\_\_ list of participants (local option credit modules are ineligible for stipend reimbursement)