

1983

A Field Experience Involving the Development of a Handbook for Beginning School Board Members

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A FIELD EXPERIENCE INVOLVING THE DEVELOPMENT OF
A HANDBOOK FOR BEGINNING SCHOOL BOARD MEMBERS
(TITLE)

BY

LYNN R. STRACK

A FIELD EXPERIENCE

~~XXXXXX~~
THESIS

SUBMITTED IN PARTIAL FULFILLMENT OF THE REQUIREMENTS
FOR THE DEGREE OF

SPECIALIST IN EDUCATIONAL ADMINISTRATION

IN THE GRADUATE SCHOOL, EASTERN ILLINOIS UNIVERSITY
CHARLESTON, ILLINOIS

1983
YEAR

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ABSTRACT

A FIELD EXPERIENCE INVOLVING THE DEVELOPMENT
OF A HANDBOOK FOR BEGINNING
SCHOOL BOARD MEMBERS

A REPORT SUBMITTED TO
THE FACULTY OF THE DEPARTMENT OF EDUCATIONAL ADMINISTRATION
IN CANDIDACY FOR THE DEGREE OF
SPECIALIST IN EDUCATIONAL ADMINISTRATION

BY

LYNN R. STRACK

CHARLESTON, ILLINOIS

A B S T R A C T

of

A Field Experience Involving the Development
of a Handbook for Beginning
School Board Members

by

Lynn R. Strack

A field study involving the development of a handbook for beginning school board members, by the writer, under the direction of Dr. Matzner of the Eastern Illinois University Department of School Service Personnel, is summarized in this paper. A handbook for beginning school board members was developed to assist them in the difficult areas of school operations as designated by board members now serving school districts in central Illinois.

The field study involved gathering information from boards of education on the problems they encountered as beginning school board members. The problems were categorized into major topics and a handbook was developed discussing pertinent information for a new board member on each topic.

The author gathered information for the individual topics based on his sixteen years of personal experiences in public education as a teacher and administrator. School board

members, superintendents, and instructional staff were used as resource persons to give a wide spectrum of opinion as to the knowledge needed to function efficiently as a school board member. The library served as a valuable resource since much has been written in recent years on the duties, powers, and responsibilities of school board members.

The largest part of the paper is the actual handbook. The topics addressed are duties, powers, and responsibilities of school board members, revenue, employment practices for the district's staff, evaluation, collective bargaining, federal funded programs, expenditures, curriculum, and budget. The topics are presented in such a manner that the average layperson in the community would be able to understand the material.

The writer includes recommended materials from the National School Boards Association and the Illinois School Boards Association as a supplement on the various topics. Tables, charts, and data were selected for use, by the writer, from the Illinois State Board of Education.

The handbook prepared is an attempt to present items which school board members designated as being important when they were first elected to the board of education. The information should serve only as a starting point for new board members and should not be intended to serve as a comprehensive guide for all board members.

ACKNOWLEDGMENT

First, the author wishes to thank his family, especially his wife, for their encouragement and patience, in the completion of this field experience.

Grateful acknowledgment is also given to the many school board members and superintendents of schools for their input and suggestions about the topic of becoming a successful school board member.

The author would also like to express appreciation to his advisor, Dr. G. C. Matzner, for his guidance and advice during the preparation of this project.

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CHAPTER I

INTRODUCTION

BACKGROUND

The demand for accountability of school board members to the community they serve is estimated to be greater than at any other time in recent years. Since there is no type of formal preparation for board members in the state of Illinois, a determination was made to study and address the difficult areas for new board members as designated by them.

Having worked directly and indirectly the last sixteen years with different boards of education, the author often found it obvious that individual board members sometimes felt they were poorly prepared to make important decisions concerning the operation of a school system. Being an effective school board member is a difficult and time-consuming task. If new board members are to function in an effective manner, they must become knowledgeable in many areas of school operations.

Boards of education must make periodic decisions which affect the lives of thousands of students each year. If they are to make wise decisions, they must have some basic knowledge in the multi-dimensional areas in which they find themselves involved. However, it is virtually impossible for board members to have a working knowledge of all aspects of school operations. Since the study was directed to the more important functions and responsibilities of board members, the problems addressed were information which would be most helpful to a beginning school board member.

School board members come from all walks of life with various levels of intelligence, education, wealth, social values, and backgrounds. The major objective of this study was to present the material in such a manner that the average lay-person in the community would be able to understand the topics addressed. One of the potential problems of this study was to present the terms of normal school operations in simplified outline which could be understood by people who do not work in the school situation.

STATEMENT OF PROBLEM

The modern school board is designed to be a policy-making group of lay citizens. In most instances, the elected members

are untrained in school operations and have little knowledge about educational policies. Yet, most board members are sincere, intelligent, hard-working individuals who conscientiously devote much time and effort toward the betterment of education in their communities.

One of the disadvantages of lay citizens on the board of education is their short tenure of service if they are not re-elected. If they begin with little or no knowledge of their role and responsibility, by the time they have acquired a working knowledge, their tenure is completed. Board members need to know some of the basic information pertinent to school operations before they choose to run for the board or shortly after their election. Since boards can change on a yearly or bi-yearly basis, board members should have a workable knowledge in order to be effective and to develop continuity within the board.

Board members quite often unknowingly abuse their roles because of ignorance to their duties and responsibilities. The relationship between board members and the administrative staff, the teaching staff, the community, and other district employees, is quite complex. If board members have a basic knowledge of school operations as beginners, they can devote more time to fostering good working relationships with the

above-mentioned groups.

A handbook developed to prepare a beginning board member for his role on the board would be an extremely valuable document. The handbook should state in layman's terms the duties and responsibilities of a board member and generally acquaint the individual with issues and topics of normal school operations. The handbook should serve only as a starting point with basic information and should not be intended to serve as a comprehensive guide for all board members.

PROCEDURES

It was decided the data collected would be obtained from small school districts with high school enrollments under 500 pupils. A letter (see Appendix A) was sent to approximately fifty boards of education asking their individual board members to respond to the questionnaire. The questionnaire (see Appendix B) consisted of a list of nineteen items related to normal school operations of which board members need to have a workable knowledge. They were to list by priority the items they would like to have known more about as beginning board members.

The responses from individual board members were totaled and ranked to determine which topics they felt were most important.

The results are shown in Table I

TABLE I
TOPICS RELATED TO NORMAL SCHOOL OPERATIONS

1. Expenditures
2. School Boards--Duties, Powers, and Responsibilities
3. Taxation (Sources of Revenue)
4. Budgeting Procedures
5. State Aid
6. Curriculum - Accreditation Standards
7. Teacher and Administrator Evaluation
8. Employment Practices
9. Federal Education Programs
10. Collective Bargaining
11. Student Discipline
12. Official School Board Meetings
13. Tenure
14. Professional Negotiation Agreements
15. Transportation
16. Bond Referenda
17. School Board Minutes
18. Leaves of Absence/Employment - Dismissal
19. Title IX

It was then determined to gather as much information as possible on the ten most critical topics and develop a handbook for a beginning school board member. The information on each topic is to serve only as a starting point of basic information and not as a detailed comprehensive study.

CHAPTER II

REVIEW OF RESOURCES

BOARD MEMBERS

After serving on the board of education, members can offer valuable advice as to what is important to know when starting on the board. Therefore, board members were consulted on an individual basis and asked questions about their experiences and concerns as beginning board members. Some of their statements were very helpful as insights into the difficulties they discovered during the first months or, in some cases, even the first years on the board. Their replies indicated a need for some type of publication to acquaint new board members with their roles, duties, and responsibilities.

SUPERINTENDENTS

Various superintendents were contacted to determine the topics and issues they felt were important to new board members. Since the superintendents are knowledgeable in the many aspects

of school operations, it was important to know the amount of detail they felt new members needed to know in order to function efficiently. As a part of the questionnaires, the superintendent was to list by priority the topics he felt new board members should understand in order to be effective. Because the board serves as the body of citizens to which the superintendent must answer, it was important to see that perspective in gathering the information for the handbook. The data received from superintendents also provided insight into the complex relationship between lay board members and their professional chief executive.

INSTRUCTIONAL STAFF

Information was obtained from individual staff members to determine what they felt board members should know to improve the instructional programs. The instructional staff works indirectly with the board, yet it is directly affected by the decisions of the board. The board also makes decisions governing the employment practices of the instructional staff, producing an employee-management relationship. Staff members are professional educators who are indirectly responsible to the policies made by the lay board members. This creates a complex

situation; therefore, it is important to use the instructional staff as a resource.

SELF-EXPERIENCE AND OBSERVATION

Having been involved in education for the past sixteen years as a teacher, coach, and principal, the author felt his own experience and observation are valuable as a resource in the development of a handbook for new school board members. The experience has included working directly and indirectly with board members on subjects such as finance, collective bargaining, student and faculty relationships, and other issues. Even more important, the author had the opportunity to work with board members who were beginners and some who had been on the board for many years. The diversities of their experiences and ideas gave the author a valuable insight into their role as school board members.

LIBRARY TIME

The library served as a valuable resource because much has been written in recent years on the duties and responsibilities of school board members. The national and state school board associations' published periodicals and publications to assist

boards to prepare themselves better for their duties. Much of the information found in the literature and pamphlets had to be updated since the laws and policies affecting schools are constantly changing. There were many books, periodicals, and other publications which had related information dealing with some of the topics in the development of the handbook. The Illinois State Board of Education had some important publications, especially in the area of finance and the federally-funded programs. Much of the related information found in the articles was used in the actual preparation of the Handbook For Beginning School Board Members.

CHAPTER III

CONCLUSIONS AND RECOMMENDATIONS

Being an effective school board member is a difficult and time consuming task. Boards of education are made up of individuals who must think as individuals, yet make decisions as one policy-making body. The duties and responsibilities of board members require them to have knowledge in areas of educational operations for which most of these individuals have little training or expertise. In many communities, being on the board will change a person's "citizen" status to board member status.

A new board member will quickly discover the tremendous variety of concerns with which the board deals. There will be many procedures and practices which will probably be unknown to a new board member as well as the interests, backgrounds, concerns, and goals of the other board members. State law pertaining to education, skills of group decision-making, procedure for the actual board meetings, parliamentary procedure, and the process for establishing and changing policy are only some of the items which will boggle the mind of a beginning board member.

A new board member should not be overwhelmed by all the unknowns of boardmanship or feel inadequate because he is unable to answer the questions which his constituents are asking. Rather, he should gain enough basic knowledge to be able to ask intelligent questions, evaluate the responses, and help make board decisions. The key to becoming a good board member lies in asking the right questions and being able to interpret the responses and information received.

It is the feeling of the author that new board members could be better prepared for boardmanships if they could acquire a basic knowledge of school operations. The information should serve only as a starting point in their path to becoming better board members. The complexity of the role in which board members find themselves makes it extremely difficult to function effectively. If some basic knowledge is known initially, the process of becoming effective will probably happen at a faster rate.

The handbook prepared is an attempt to present items which school board members designated as being important when they were first elected to the board. Education is an ever changing process and the items which confront board members today may be of little significance in future years. It is the recommendation of the author that beginning school board members be

given a handbook which will generally acquaint them with their duties and responsibilities, basic school operations, school terminology pertaining to boards, and insights into major educational issues.

The field experience served as a valuable step to the author in his career objective of becoming a superintendent. It caused the author to reduce to writing the role and expectations of a board member as depicted through the eyes of a professional educator. A deeper sense of the relationship between the board and the superintendent was recognized as being extremely important if the school district is to achieve its objectives. It became quickly apparent in the preparation of the handbook that board members need the superintendent and the superintendent needs the support of the board.

It is impossible to list all the benefits derived from this field experience, but an enormous amount of perspective was gained in the problems of a beginning school board member. When the author has the opportunity to function as a superintendent, the field experience will prove helpful in working with new board members.

APPENDIX A

LETTER SENT TO SUPERINTENDENTS

R. R. #3, Box 153
Tuscola, IL 61953
September 27, 1982

Dear Colleague:

The demand for accountability of school board members to the community is estimated to be greater than at any other time in recent years. Since there is no type of formal preparation for board members in the state of Illinois, I have decided to study and address the difficult areas for new board members as designated by them. The study will serve as partial fulfillment of the requirements for the Specialist in Ed. D. at Eastern Illinois University.

I hope that the results of this study will provide information for new or prospective school board members which will help them to understand their duties and responsibilities to the community they serve.

Please have your board members take a few minutes to read and answer the enclosed questionnaire. Also enclosed is a similar questionnaire for you. The information you provide will be grouped with that from other districts in order to assure anonymity.

Please return the questionnaire by November 1, 1982, in the enclosed stamped envelope. Thank you in advance for your courtesy and assistance.

Sincerely,

Lynn R. Strack

Enclosures

LRS/paw

APPENDIX B

QUESTIONNAIRE GIVEN TO BOARD MEMBERS
AND SUPERINTENDENTS

Listed below are several areas dealing with the operation of a school district for which school board members are expected to have a workable knowledge. Please mark the areas that you would have liked to have known more about as a newly elected school board member.

List the most important as #1, the next more important as #2, and so on. Thank you for your help and assistance.

- _____ Employment Practices
- _____ Curriculum - Accreditation Standards
- _____ Leaves of Absence/Employment - Dismissal
- _____ Transportation
- _____ Student Discipline
- _____ Taxation (Sources of Revenue)
- _____ School Boards - Duties, Powers, and Responsibilities
- _____ Expenditures
 - A. Education Fund
 - B. Building Fund
 - C. Bond and Interest Fund
 - D. Transportation Fund
 - E. IMRF
 - F. Working Cash Fund
- _____ Federal Funded - Programs
- _____ Tenure
- _____ Collective Bargaining
- _____ Teacher and Administrator Evaluation
- _____ Title IX
- _____ Budget
- _____ Bond Referenda
- _____ School Board Minutes
- _____ State Aid
- _____ Professional Negotiation Agreements
- _____ Official School Board Meetings

APPENDIX C

HANDBOOK FOR BEGINNING
SCHOOL BOARD MEMBERS

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DUTIES, POWERS, AND RESPONSIBILITIES

Since public education is a responsibility of the state, boards of education have only those powers and duties granted by the General Assembly. These powers and duties are stated in Article X of "The School Code." Duties are the mandatory requirements the board of education must perform. Powers are the permissive acts a board may perform.

Article X of "The School Code" sets forth the duties of the school board. Among those listed are the following:

1. Employ a superintendent who shall have charge of the administration of the schools under the direction of the board.
2. Maintain records to substantiate claims for state aid.
3. Provide necessary revenue.
4. Employ teachers and fix their salaries.
5. Direct what shall be taught and what textbooks used.
6. Maintain kindergartens.
7. Adopt a school calendar.
8. Pay all orders and let all contracts.¹

Most of these duties are delegated to the professional staff through the superintendent. The professional staff is responsible to the board for carrying out the duties, but the board

is responsible to the state and the citizens of the community.

Perhaps the most significant duty assigned to school boards is "to adopt and enforce all necessary rules for the management and government of the public schools of their district."² This duty grants boards the power to make the necessary policies to chart effectively a course of action for their school district and the force of law to back up those policies. Board policies must be formally adopted by the board, reduced to writing, and filed for public inspection in the administrative office of the district to exist in the eyes of the law. In 1955, The National School Boards Association and The American Association of School Administrators jointly developed a general definition of school board policy:

School board policies are statements which set forth the purposes and prescribe in general terms the organization and program of a school system. They create a framework within which the superintendent and his staff can discharge their assigned duties with positive direction. They tell³ what is wanted. They may also indicate why and how much.

Policies should tell what the school board wants, but they should be consistent with the community's philosophy and objectives for the school. Since board policies must be consistent with state and federal laws, they are constantly being revised. It is essential for board policies to be reviewed periodically and kept up-to-date with changes in laws and conditions.

Good policies give direction to board members, administrators, staff members, and other personnel directly responsible for achieving the board's goals. The board of education must follow its own policies and establish credibility with employees and the community by clearly stating its intentions to adhere to them consistently. The board may change or modify a policy, but it should be done in a proper manner that is consistent with the law. A change in policy is simply a reflection of new thinking by the board.

The board of education must develop and adopt all the necessary policies to govern the many facets of school operations. A board will often ask the superintendent or other staff members for recommendations, but the final decision to adopt a policy belongs to the board. Once the policy has been adopted, the board should delegate authority to the superintendent to implement the policy and give periodic reports on the execution and effect of the policy.

Policy-making is the board's major function, but designating a chief executive is probably the next most important responsibility of the board of education. The task cannot be delegated even though the board may seek the outside services of agencies that specialize in this facet of education. In smaller districts, it is especially important to recruit and hire a superintendent

who can administer the many areas of an educational program. Smaller districts will be unable to hire the personnel to give specialized supporting services; the chief executive will have to be knowledgeable in all areas of school operations.

A good board of education will facilitate a good superintendent, and the converse is true. The superintendent must have the support of the board and needs its power base in order to carry out his duties. The Illinois Association of School Boards and the Illinois Association of School Administrators have adopted a statement of principles and procedures for effective cooperation between a board of education and its chief administrator. It is recommended to board members and administrators that they read carefully and keep in mind always these principles and procedures. (see Appendix A for the statement in its entirety)⁴

The relationship between the board and the superintendent should be viewed as the top management team for the school district. The board makes policy, but the superintendent must be a partner in the process, and the board should have a cooperative role in the administration of policy. Each should protect the role of the other but cooperate to benefit the entire operation.

Operationally, the superintendent works for the board of

education, and all other staff members work for the superintendent. The superintendent cannot administer the school system if the board is considered the "boss." A board of education has the right or responsibility to know what is going on in the school system and to formulate policy to govern the schools, but the input and output of information should be through the superintendent. A board owes its staff and personnel a single policy and administrative channel.

Personnel matters should be discussed only in executive sessions of the board and should not be discussed in public. Board members must learn to trust each other and to keep important matters between board members and the superintendent confidential. They must view their relationship as a team which will not be successful without the support and understanding of each other.

The board is responsible for establishing current and long-range educational goals for its district. The administration and staff should furnish the necessary data about the school's programs so that the board can make wise decisions on future plans. After the board has established policy to implement the plans, the administration should periodically evaluate and appraise the programs and report its findings to the board.

The board of education is required by law to have prepared and adopted an annual budget which will provide the financial basis to carry out the educational programs. All expenditures of the school district must be authorized by the board, and policies should be established which control all financial transactions of the district. In most districts, the board delegates to the superintendent the tasks of hiring, evaluating, and disciplining the staff, but the board is responsible for adopting salary schedules, terms and conditions of employment, and fringe benefits. The board must ratify all collective bargaining agreements.

Other responsibilities will involve working closely with the superintendent and accepting, rejecting, or modifying his recommendations on instruction, textbooks, school facilities, student-related problems, and public relations. The National School Boards Association lists the following activities as general responsibilities of the board member:

1. Establish procedures for the operation of the board.
2. Elect board officers.
3. Approve the annual school calendar.
4. Hire board staff assistants.
5. Determine who will be on the district negotiating team (if there is one) and employ a chief negotiator for collective bargaining.

6. Establish attendance zones for the school district.
7. Retain an attorney or law firm for the school district.
8. Set strategy and coordinate litigation decisions when the school district is involved in a lawsuit.
9. Establish and maintain effective board-superintendent relations.
10. Periodically review and evaluate board operations and performance.
11. Work with (as well as authorize the administration to work with) city, county, and other government and non-government officials and agencies.
12. Become well versed in parliamentary procedures.
13. Learn how to get and present facts, not merely interpretation of them.
14. Devote sufficient time, thought, and study to proposed actions.
15. Consider alternative solutions to problems.
16. Encourage ideas and opinions from students, staff, and citizens of the district, and endeavor to incorporate their views in your deliberations and decisions.
17. Work with the rest of the board to establish effective board policies by which the superintendent can administer the schools.
18. Establish fair and equitable terms and conditions of employment and evaluation for all school employees.
19. Select sound instructional strategies and materials, and submit them to regular and impartial evaluations.

The board of education has the power to act as it exists, only as a group. An individual board member must learn quickly to function as one member of the total board. The board owes the community it serves intelligent, combined judgments, free from special interests. Members of the board are elected to

represent the citizens of the community, but they should think for themselves and act for the benefit of the district.

The National School Boards Association, in conjunction with the Illinois School Boards Association, has developed a model code of ethics (see Appendix B)⁶ which boards of education should adopt and use. They also have developed various model orientation packages (see Appendix C)⁷ which help the new member to become better acquainted to the task of boardmanship.

A new board member will quickly realize that his or her responsibility is not to run the schools, but to see that they are well-run. The individual member has no legal power and authority and should never act in that capacity. To be effective, citizens' inquiries and complaints should be referred to the staff member who is closest to the source of the complaint or who has the needed information. Board members must be good leaders who learn to solve problems at the lowest level. They should view their position as one of final authority on school matters and not assume the role of solving all the school district's problems.

One of the most important areas of concern in recent years has been the credibility of school boards, mainly due to financial problems and the complexity of school operations.

Board members must believe in what they are doing and seek the trust and the support of the citizens. Mistakes will be made because the demands are tougher and the job more difficult, but the board of education should be looked up to for excellence, integrity, sincerity, and leadership in the educational matters of the school district.

H. Michael Finkle was president of Danville District 118 Board of Education when he made the following address to new board members. He retired from the board in April, 1978.

The following thoughts are strictly personal, deeply felt, and based on experience as a board member and president over the past several years. I hope they are of value to you, the new board member.

IMAGE - We board members, administrators, and teachers are the public schools. When people look at us, they see their school district. How the public perceives us, in part at least, determines how well we do with kids. The following image-forming items need our attention:

1. Grooming and dress do matter.
2. Board members must speak the king's English.
3. Board members must speak effectively in a public forum (if you need a professional seminar to improve, arrange one).
4. Board members must deal fairly, openly, and evenhandedly with all sectors of the community.

We must avoid interest in only certain areas, or alignment with any special interest group.

GOALS OR OBJECTIVES - All goals must be arrived at in an open, business like, and objective manner. They should be reduced to written form and distributed to staff and community. Board members must manage by objectives, set policy goals for a district, and hire the staff to administer and achieve those goals. Don't ever become a day-to-day administrator or operations person. Be

concerned with objectives, policy, and their implementation. If your administrators can't or won't carry out your goals, you probably have the wrong administrator.

COMMUNICATION - Everything relates to communication. Publicize your meetings and actions to your staff and the community. Televisize your meetings live if possible. Make your local press experts in education; expose them to your complete operation. Get them into classrooms to see what's happening; give them all of the inservice training they need and can absorb. Don't contrive situations. Let the press see you, "warts" and all. Let them get a feel for the openness, candor, and tough mindedness with which you manage your district.

PERSONNEL - One of the most important things you can do to help make your staff more effective is to let them know they have your full backing and support, then make good on that promise. Give people the authority they need to do their jobs and be sure that authority is respected.

Step in to share the responsibility and help clean up the mess when things go wrong without finger-pointing or condemnation. Anyone who tries to do the best job he can is bound to make mistakes. It's inevitable when people work together - part of the price of progress. When a person runs into these difficulties he appreciates having a boss who will stand behind him.

Backing a subordinate doesn't mean insisting that he is right when he is obviously wrong. But it does mean accepting part of the responsibility for the boner, helping him carry the blame, and helping him get back on the right track. Errors in judgment are something we all make and should learn from.

FISCAL RESPONSIBILITY - Each problem is also an opportunity. The current financial squeeze is an opportunity to reassess expenditures and priorities across the board, and to reduce whenever possible. To fall back on faulting the State, anticipating revenue, deficit spending and knuckling under employee bargaining pressure is irresponsible, and avoids confronting the issue. Live within your income and you'll survive; it's that simple.

POTENTIAL CONFLICT OF INTEREST - Know what the law says and obey it. Don't wait for someone to point it out to you. Keep your own house in order. Any public

body, especially in the field of public education, needs to avoid impropriety as well as the appearance of it. The Illinois Association of School Boards has a model code of ethics. Adopt it and use it.

To those who engage in public work, my message is simply this . . . Be of great courage and determination. Act with candor and evenhandedness but with ruthless devotion to a spirit of excellence, not numbing mediocrity. The national need is so great and our time so short. Our children and thus, our future, depends on your success.

The duties, powers, and responsibilities for the board of education appear overwhelming to a new member, but with proper guidance, dedication, and hard work, a new board member can become an important contributor to the total team.

REVENUE

Public schools are supported by funds from three sources: the local government, state government, and the federal government. The largest amount of money comes from the local and state levels. The federal government was relatively late in coming to public school funding, and recent indications would warrant the probability of an early departure.

In the 1982-83 fiscal school year in Illinois, the state will contribute approximately 39% to the average school district. Local revenue will be approximately 53%, and federal contributions will be about 8% to the average district. Table II shows state, local, and federal financing for public schools during the period of 1966-67 through 1982-83.⁹ Table II was taken from the Illinois State Board of Education publication, State, Local, And Federal Financing For Illinois Public Schools 1982-1983.

TABLE II
STATE, LOCAL, AND FEDERAL RECEIPTS
OF FUNDS FOR THE COMMON SCHOOLS
DURING THE PERIOD 1966-67 THROUGH 1982-83
(\$ IN MILLIONS)

Year	State	Percent State	Local	Percent Local	Federal	Percent Federal	Total
1982-83	\$ 2,202.8	38.93	\$ 3,014.0	53.27	\$ 441.3	7.80	\$ 5,658.1
1981-82	2,243.3	40.15	2,845.0	50.91	499.6	8.94	5,587.9
1980-81	2,328.1	43.13	2,596.0	48.10	473.4	8.77	5,397.5
1979-80	2,218.5	42.34	2,485.0	47.43	536.3	10.23	5,239.8
1978-79	2,128.9	43.86	2,298.0	47.34	427.0	8.80	4,853.9
1977-78	2,040.9	44.32	2,134.0	46.35	429.8	9.33	4,604.7
1976-77	2,000.6	46.88	1,943.0	45.52	324.2	7.60	4,267.8
1975-76	1,988.1	48.36	1,856.8	45.16	266.5	6.48	4,111.4
1974-75	1,326.1	34.39	2,310.6	59.93	219.1	5.68	3,855.8
1973-74	1,325.8	38.10	1,962.5	56.39	191.8	5.51	3,480.1
1972-73	1,160.3	36.72	1,808.4	57.23	191.2	6.05	3,159.9
1971-72	995.7	37.42	1,508.6	56.70	156.5	5.88	2,660.8
1970-71	954.7	39.61	1,301.4	54.00	154.0	6.39	2,410.1
1969-70	787.0	30.74	1,651.4	64.51	121.6	4.75	2,560.0
1968-69	516.6	27.94	1,228.3	66.42	104.3	5.64	1,849.2
1967-68	491.9	27.13	1,230.0	67.84	91.1	5.03	1,813.0
1966-67	368.6	25.04	1,014.1	68.89	89.4	6.07	1,472.1

A board certainly is not expected to know and understand all of the details of school finance, but it should develop a workable knowledge and understanding of the financial matters of the district. In general, school districts in Illinois have four primary sources of income: 1. local taxes; 2. state aid; 3. federal aid; and 4. borrowing.

Each year the board formally adopts a budget that states the amount of money which will be needed in local tax dollars. The remainder of the budget the board will expect to get from state aid and from other sources. A tax levy is filed with the county clerk who extends taxes and produces tax bills for the individual property owners. When taxes are collected, the money will be distributed back to the school districts. Normally, schools will not collect taxes for nine months to a year after the budget and tax levy have been adopted.

Tax rates are based on the various funds that have been established by the state of Illinois. The funds are revenue and expenditures accounts set up to obtain an objective. The education fund deals primarily with the instruction of students; the operations, building and maintenance fund is primarily concerned with energy costs and the upkeep of buildings; the transportation fund pertains to all income and expenditures of the transportation program of the district. There are other small funds to meet specific purposes such as capital improvement, bond and interest, tort

immunity, working cash, municipal retirement, and life safety.

Accounting procedures in the state of Illinois requires income and expenditures to be accounted for through the use of these funds. Each fund has a tax-rate limitation depending on the type of school district. In Illinois, there are three types of districts: elementary (K - 8), high school (9 - 12), and unit (K - 12). The major funds have a limit that cannot be exceeded without approval of the voters of the district. Approval of the voters is obtained by having a referendum for an increase in the tax rate. Even with voter approval, there is a limit on the tax rate in each fund. Table III shows the school district tax-rate limitation for each type of district with and without referendum.¹⁰ Table III was taken from the Illinois State Board of Education publication, State, Local, and Federal Financing For Illinois Public Schools 1982-1983.

TABLE III
SCHOOL DISTRICT TAX RATE LIMITATIONS
 (Chicago District 299 not included)

Levy	District Type	Without Referendum (%)	With Referendum (%)
Educational Fund	Elementary	0.920	3.50
	High School	0.920	3.50
	Unit	1.600	4.00
Operations, Building & Maintenance Fund	Elementary	0.250	0.55
	High School	0.250	0.55
	Unit	0.375	0.75
Capital Improvements Fund	All	0.000	0.06
Transportation Fund	All	0.120	As Needed
Summer School	All	0.000	0.15
Bond and Interest Fund	All	N/A	As Needed
Rent Fund	All	N/A	As Needed
Illinois Municipal Retirement Fund	All	As Needed	N/A
Tort Immunity	All	As Needed	N/A
Working Cash Fund	All	0.050	N/A
Fire Prevention, Safety, Environmental and Energy	All	0.050	0.10
Special Education Building Program	Elementary	0.020	N/A
	High School	0.020	N/A
	Unit	0.040	N/A
Area Vocational Education Building Program	High School	0.000	0.05
	Unit	0.000	0.05
Tort Judgment Bond	All	As Needed	N/A

The actual amount of money the school district will receive in each fund is found by multiplying the tax rate times the equalized valuation. Assessed valuation is the total value of the real property of a school district as determined by assessment. Theoretically, assessed valuation should be 33 1/3% of the fair market value of the property, but there are exceptions on farm property and in home-rule counties. If the assessed valuation of a school district is \$50,000,000 and its tax rate in the educational fund is 1.60%, the district will receive approximately \$800,000 ($\$50,000,000 \times .016$). Another way to determine funding is to calculate \$1.60 for each \$100 of assessed valuation ($50,000,000 \div \$100 = 500,000 \times \$1.60 = \$800,000$).

To state the same principle on an individual taxpayer's property valued at \$60,000, find the assessed valuation (1/3 of \$60,000 = \$20,000), and multiply it by the tax rate in the education fund which is 1.60%. The tax for this individual for this single fund would be \$320 ($20,000 \times 1.60\%$). The total amount an individual pays in property tax is found by adding the tax rates of all funds and multiplying that total times the assessed valuation of his property.

Local property tax carries a heavy burden of school support, and has come under criticism because it has not qualified as the

perfect tax, or even as a fair and reasonable tax. Homeowners and property owners, especially rural landowners, complain they carry too heavy a burden of the taxes for schools. Local school administrators feel the revenue from property tax alone is not enough for good, quality education.

Taxpayers charge that too much property is exempt from taxation, such as churches, educational institutions, and charitable institutions. Tax officials are under constant fire for inadequate assessment and for laxity in collecting taxes. Even though property tax has been heavily criticized for years, a better plan for supporting schools has not been developed. Local taxpayers have the responsibility of supporting their schools and have the freedom of giving as much support as necessary for the quality of education they desire for their children.

The second primary source of revenue comes from the state in the form of state aid. The principle of state aid is a guarantee by the state of Illinois that each school district will have a certain amount of revenue for each pupil in average daily attendance. Wealthy districts receive very little state aid because nearly the full amount of revenue is raised through local property tax. Districts with low property values are able to raise only a small portion of the guaranteed amount from local taxes and receive most

of their funds from the state.

States have attempted to be the great equalizers of educational opportunities with their foundation programs and equalization programs. All of these programs have the same purpose: to see that every child, regardless of the economic condition of the school district in which he lives, receives an adequate education.

The state aid formula in Illinois is based on a foundation level established each year. The foundation level appropriated for general state aid in 1982-83 is \$1,657.68. There are many factors involved in the actual formula to calculate the amount of dollars that a school district will receive. The factors involved are the average daily attendance of pupils, number of low income families within the district (Title I eligibles), operating tax rates of the district, and other minor details that pertain to individual school districts. In general, the principle is to give more state aid money to the districts that are least able to support their schools at the local level.¹¹

Average daily attendance is the aggregate (total) number of pupil days in attendance divided by the number of days in the regular school session. For purpose of the state aid formula, high school students are counted as 1.25, students in grades 7 - 8 as 1.05, and students in K - 6 as 1.00 for each day in attendance.

Title I eligibles (low income families) also receive additional formula weighting which ranges from zero to a maximum of .625.¹² The weighted factor is an attempt by the state to equalize educational opportunities by reimbursing school districts more for older students and those that come from low income families since the cost of educating these students is greater.

For school districts which have unusual circumstances, such as large districts with few students or extremely wealthy districts, the state has an alternate method or a flat grant method. Every school district should calculate each of the three methods to determine which will entitle it to the most dollars. The state aid formula, like local property tax, has come under continuous criticism, but an alternate plan to accomplish the same objectives has yet to be developed and proven effective.

The state also provides special funding in transportation, handicapped education, vocational and adult education, driver education, and textbooks. The amount of funding is largely based on the need as determined by each district. In recent years, the trend has been toward decreased support for these programs from the state due mainly to the economic conditions of the nation. In the 1960's and 1970's, these and other similar programs flourished because economic conditions were good, and the state

had more money to allocate to education.

The third partner in the support of education is the federal government which contributes less than 10% in the form of special programs and services. Federal dollars have rarely been permitted by school districts for general operations, and the guidelines, restrictions, controls and limitations have always been imposed on the user of the money by the federal government. Many school administrators and board members feel the strings attached to federal funds negate the apparent value. The specialized program support has not always benefited the average school district where the money needed is for the general operation of the schools.

The programs to fight poverty, to bolster national defense and to bring about equal educational opportunities have been the bulk of the federal assistance to schools in recent years. Vocational education, metric education, and school libraries are typical programs in which the federal government has shown a special interest. In the 1950's and 1960's, Congress passed laws and gave federal dollars to improve instruction in science, math, foreign languages, and some technical skills which were thought necessary for bolstering our defense.

The most famous congressional program to fight poverty has

been Title I (of the Elementary and Secondary Education Act of 1965) which provides grants to local school districts with large concentrations of children from low income families. School lunches, milk programs, and student loans are a few of the examples of the federal government's attempt to help children from families needing financial help. In recent years, Congress has passed measures to promote desegregation, to ensure equal treatment of the sexes, and to give special attention to the handicapped child. Some attention has been given to the child who is having difficulty in mastering the English language through a bi-lingual program.¹³

Federal dollars are used for special programs and specific areas, whereas local and state dollars are used for the general operation of the school district. The federal contribution, even though small in percentage, has produced some worthwhile programs which have provided relief for segments of the population. Some school administrators and educators feel the federal government could contribute more support with less "strings attached" because of the large tax base. Financial reform will continue to engage the best minds in the field for years to come, seeking ways of spreading out the burden of school support.

A school board member needs to understand the meaning of

borrowing and the meaning of debt in their various contexts. Borrowing can be a source of income for a fiscal period even though it must be repaid at some future date. Borrowing can be constructive, or it can be a disease eating at the foundation of a school district. To make wise decisions on financial issues, a board member must have some insight into the impact of borrowing.

School debt is classified as long-term and short-term debt. Long-term debt is usually bond and interest payments for building and requires voter approval. The revenue to pay off long-term debt is received through the bond and interest fund. Short-term debt usually represents borrowing money against future tax collections through tax anticipation warrants.

Tax anticipation warrants are notes issued by a school district in anticipation of the collection of taxes and may be issued to the extent of 85% of the total amount of the tax levied. These warrants must be repaid by the district upon receipt of tax monies. The state sets interest rates that cannot be exceeded, but school districts may borrow the money at a lesser interest rate if possible. Many school districts are forced by circumstances to borrow money against taxes anticipated for the next fiscal year, but a continuation of this process will quickly destroy the financial stability of a district.

If the accumulated debt continues to increase because of deficit financing, the board must seek an alternative solution to the financial problem. Some school districts are able to deficit-spend in one fiscal year and repay the amount in future years. In this circumstance, borrowing would be a logical source of income for the fiscal year in which it is needed.

There are still other sources of revenue for school districts, but they usually provide very limited amounts of money. Some of these sources include student tuition and fees, rental of school property, private funds, income from school sponsored activities, insurance, and interest. Boards have found it very productive to invest unused revenue, even on a short-term basis, as a source of interest income. Financing of schools is undoubtedly the most common problem confronting school board members and administrators. With increasing costs, decreasing revenue, and demands for better educational services, the financing of quality education is a major concern of board members most of the time. To be capable of making the necessary decisions, a board member must understand the complex financial problems of the district. A well-informed board of education can make a big difference in the financial health of a school district.

EMPLOYMENT PRACTICES FOR THE DISTRICT'S STAFF

The board's role in the employment practices of the district is one of being directly involved through policy making but indirectly involved through the chain of command. The board must establish clear and concise policy to give the staff direction in regard to its employment. The authority to implement these policies must be delegated through the chain of command, but the board should understand how the administration plans to carry-out these policies. Effective board members will learn how to keep in touch with non-management employees of the district and still stay within the limitations of the chain of command.

Most board members will feel a need to come into direct contact with the non-management employees to be aware of what is happening in the district. A very careful approach to this type of action is warranted because there is a fine line which separates legitimate participation from an improper breach in the chain of command. The board's role is that of policy-maker, and all board action must come from policy.

The board's role in hiring staff is usually based on recommendation from the administration. Even though the board is the legal employer of all the district's employees, it seldom is

involved in the interviewing and selection process. The board should establish clear policy and procedures for hiring and not get involved except in hiring the superintendent or some other key personnel. In some smaller districts, the board still interviews the two or three top candidates for a position and then hires its choice, but this is becoming the exception rather than the rule.

Employee compensation will be one area of major concern when making policy relating to employment practices. How much the district pays the employees will depend on how much money a district has and how much the board is willing to spend to get what it wants. Most districts will have some sort of salary schedule which will indicate the minimum and maximum salaries based on years of experience and level of education achieved.

If the professional staff has a contract, the board should adopt policy to deal with collective bargaining. Within this contract, there may be general language to cover the employment practices of the district even though salaries and fringe benefits may fluctuate from year to year. Any policy dealing with contracts should be checked through state and federal law. The board of education is legally required to give employees some benefits

and may offer others as fringe benefits. Unemployment compensation provides financial assistance to people who become unemployed through no fault of their own. Workmens' compensation provides financial assistance for employees who suffer an injury while on the job. Teacher retirement system benefits provide disability insurance, accidental disability, survivors benefits, and retirement income. Teachers are granted a minimum of ten days per year sick leave which is cumulative to 90 days. The leave is granted for personal illness, serious illness, or death in the immediate family. Even though these are required benefits, there should be board policy regarding their application.

Many school districts offer other types of benefits as part of the employee's compensation. Additional sick leave allows the board to extend the benefits beyond the minimums required by law. Sick leave banks are designed to allow teachers to pool their sick leave days as protection against financial loss due to long term absences. Personal leave days allow employees to use one or two days for personal business. Boards will need to have concise and clear policies on these practices as well as on sabbatical leave, union leave, and convention leave. Even though some of these are not a financial burden to the district, the board as employer must control these practices.

Another area of fringe benefits the board may want to consider is insurance. The cost may be paid by the board, by the employee, or jointly by both. Health insurance coverage which protects employees from expenses arising from injury or illness not associated with employment is probably the most widely used plan. Some districts provide life insurance, accidental death and disability insurance, and dental insurance. If insurance coverage is provided, the board usually pays for the employee, and the employee pays for other members of their family if they choose to insure them.

In recent years, the Internal Revenue Service has allowed boards to pay some percentage of the employee's retirement contribution. This ruling permits the employee to tax-shelter those funds until a later time when his income should be less. Some districts have designed early retirement incentive programs to encourage teachers who are old enough to retire, but who normally would not retire at that time, to retire or consent to a reduced work load. The employee can benefit by receiving extra incentive pay, and the board can benefit by replacing an employee at the end of the salary schedule with one with less experience. Some boards reimburse their employees for tuition paid for education to earn additional credits, while other boards have agreed to

severance pay for teachers who retire after lengthy service to the district. Board policy must be clear and exact to cover each fringe benefit which the board allows as part of the compensation package.

Probably one of the more important facets of employment practices is a policy providing for the evaluation of staff. Boards almost always delegate the actual evaluation to the administrative staff, but board members should be knowledgeable in how the process functions. Board members will find it useful to know exactly how teachers are rated prior to making final decisions about the renewal of staff contracts. The purpose of evaluation is to assist staff members in their development, not to fire them. Board policy should require each person to have a job description, so the evaluator can be objective and furnish detailed information about the performance of the employee.

There will be a time when employees will have to be released from their employment because of reduction in staff or their lack of ability to perform the necessary tasks. Boards must have clearly written policies to ensure due process to any staff member facing termination. Employee termination proceedings demand the advice of legal counsel because the burden of proof is on the employer. The school district must be able to show that it has tried to

correct the problem, but in spite of all efforts, the problem still persists. The termination proceedings must be fair and impartial and should follow the latest laws and court rulings. It is advisable to have separate policies on termination for the professional staff and the support staff, even though content may be similar.

Financial crises and decreasing enrollments have forced boards to reduce staff. Reduction creates a number of problems. Reduction in force is usually prescribed by law in most states, but the legal issue creates problems of seniority, staffing, and community acceptance. It is difficult to explain why an excellent, young, competent teacher is released, while an older, less efficient teacher with more experience is retained. Some reductions create staffing problems in smaller districts where one teacher might teach in two or more areas. Board policy on reduction-in-force should include a general statement that RIF's will be achieved by attrition when possible. Any terms the board has made in negotiated agreements must be taken into account when policy is adopted and implemented concerning reducing staff.

Board members must resist the temptation to become directly involved with the implementation of employment practices in the

school districts. The role of the board is to make policy covering the many aspects of employment and then delegate the responsibility for carrying out the policy to the professional staff. The board will need feedback from various sources to assure the process is functioning, but care must be taken to adhere strictly to the chain-of-command. The superintendent should answer to the board of education, and all other employees should either directly or indirectly answer to the superintendent to ensure proper communication.

EVALUATION

Evaluation is a desirable and necessary function at all levels of an efficient organization, and school systems are no exception. Every employee from the top to the bottom should be evaluated on a regular basis. The evaluation should serve as a function to improve the performance of all personnel from the superintendent to the lowest paid non-certified person.

The board of education is responsible to the community it represents to evaluate the superintendent on his effectiveness as the educational leader of the school system. The evaluation of superintendents has usually been rather informal and unstructured. It has sometimes been nothing more than a board session of praises or accusations of incompetencies. As we enter the "age of accountability" in education, boards are finding their role in evaluation of their chief executive as one of being directly involved. An honest evaluation should help the board understand the superintendency and allow the superintendent to adapt his behavior to the expectation of the board.

The Illinois State Board of Education reports in their Teacher Service Record Form dated October, 1982: "Nearly nine per cent

of all school superintendents in public education in Illinois left their jobs at the end of last year."¹⁴ Some leave to get better jobs or retire, but many leave because their boards are dissatisfied with their job performance. The superintendent's job is a difficult one, but the high turnover rate would indicate that boards are misjudging their chief executive's competencies or that there are a lot of incompetent superintendents. Evaluation has often been nothing more than individual board member's impressions of how the district is doing and has not been the total board's formal evaluation.

The superintendent's job is extremely unusual in that he will have seven "bosses" which change from year to year or from election to election. Most of these "bosses" will have little or no experience or expertise in the field of education. The superintendent realizes his job could be jeopardized over issues of which he has little control. To make his role more complex, he will be expected to administer all aspects of school operations including such items as the instructional programs, buildings, finance, personnel, and public relations with the community. Due to the complexity of the job, the board should give careful thought and consideration in choosing the method of evaluating its superintendent.

The National School Boards Association in their book, Becoming A Better Board Member, lists four processes for evaluating superintendents:

1. Checklists/rating system
2. Written essays
3. Objective analysis
4. Performance appraisal¹⁵

The checklist rating system is probably the most commonly used method because it can be completed quickly, covers a wide variety of performance objectives, is flexible, and is simple to complete. It asks questions about the superintendent's performance or the school district's performance and is usually accompanied by a rating scale (excellent, good, fair, needs improvement, or poor), which provides some meaning as to how the superintendent is performing his duties. The major weakness is its reliance on total subjective ratings. "Good" to one board member may be "excellent" to one and "average" to another when discussing the same performance objective.

Written essays rely on each board member's writing a detailed statement about the strengths and weaknesses of the superintendent's performance. Even when addressing the weaknesses it is suggested

that board members attempt to be positive to improve the relationship with the superintendent. The next step is for the superintendent to respond, usually in writing. The process is completed when the board and the superintendent discuss the content of the narratives and attempt to agree on methods of improving the weaknesses. Many boards have stayed away from written essays because their members just are not confident about writing.

Objective analysis is an evaluation process in which the superintendent, with the board's help, states in writing the things he plans to accomplish in the year ahead. The amount of work to be completed each quarter of the year is determined, and a timetable for completion is established. At the end of each reporting period an informal assessment is made, and a formal assessment is made at an annual review. Objective analysis becomes very task-oriented and develops specific accountability for each task. One of the weaknesses of this process is that some important items of business are ignored in order to accomplish tasks which have been listed as items to be completed. The process promotes ongoing evaluation through regularly scheduled checkpoints and alerts the superintendent and the board when they are getting behind schedule. The final step in the process is to develop

the objectives for the next year at the time of the annual review while the accomplishments and failures are fresh in everyone's minds.

The fourth method of evaluation is the performance appraisal which is sometimes referred to as a cross between the checklist/rating system and the objectives analysis. Performance appraisal will measure skill in human relations as well as task achievement. It will force the board to know what the superintendent's job really is. The biggest advantage of performance appraisal is its approach in taking the best from the other methods. Its major disadvantage is the amount of time and effort it requires for implementation. If the board uses this method, it should have a policy concerning the evaluation of the superintendent and a formal evaluation procedure. The board should state what it wants to accomplish through the appraisal of the superintendent.

In his article, "How To Evaluate Your Superintendent," which appeared in May-August, 1976, Illinois School Board Journal, Thomas A. Smith states that the superintendent's evaluation should contain the following elements:

1. An open-minded evaluation tool calling for group consensus.
2. Written performance objectives that are cooperatively developed by the superintendent and the school board.

Include with each objective the criteria for subsequent measurement.

3. A comprehensive job description for the superintendent as a part of board policies.
4. A formal evaluation of the superintendent each year prior to discussing his salary.¹⁶

Mr. Smith suggests that each board member write a brief response to each of the performance categories. A list which would be workable in many school districts would include the following items: relations with the board, relations with the community, relations with employees, educational leadership, building and maintenance planning, business and finance, professional advancement and contributions to education, personal traits, and a summary. Individual responses would be used as a basis for discussion, but nothing would be placed on the finished product, the written evaluation, until the board unanimously approved the content and the wording.

A meeting such as this would facilitate an open discussion of the superintendent's performance and would allow the superintendent to see how the board perceives him. He would be able to identify and correct negative feelings from the board and would have the opportunity to adapt his behavior to suit its role expectations. Requiring unanimous approval on the written evaluation should

cause the board to think deeply and to express its ideas and concerns. Through the process, board members should carefully consider their own roles and their relationships with the superintendent. The written evaluation should be given to the superintendent and discussed with him soon thereafter.

Using performance objectives and developing a comprehensive job description should provide written direction for the superintendent. When developing performance objectives, the goals must be given sufficient time and resources to achieve those objectives. If the board makes a commitment to a yearly evaluation of the superintendent as a part of board policy, it will establish the importance of evaluation to all personnel of the district.

Regardless of which method or combination of methods a school district uses to evaluate the superintendent, a formal evaluation should take place on a yearly basis. If the process is effective, incompetent superintendents should be eliminated more quickly, good superintendents should last longer, school operations should be better, and boards should be happier doing their job of overseeing and directing their school districts.

COLLECTIVE BARGAINING

Many states have passed statutes governing public employer/employee relations which allow or require collective bargaining between school boards and unions. The State of Illinois does not require collective bargaining, but has allowed boards to enter into formal, negotiated contracts with both teachers and non-teaching employees. According to the recent statistics published by Teacher/Board Collective Bargaining Information System, "There were 487 formal contracts representing 85% of the full time public teachers in the State of Illinois. 48% of Illinois public school districts have signed, written contracts with their teachers."¹⁷

Boards of education have had a tendency to blame themselves or their administrators for teachers and non-teaching employees wanting to organize. However, the reasons for wanting to organize are often beyond the control of both local boards and administrators. For example:

1. The growing size of the school bureaucracy reduces lines of communication.
2. The job shortage in education makes it difficult for the dissatisfied teacher to switch employers.
3. The teaching profession includes more and more primary family wage earners.

4. Taxpayers are resentful of increased school costs and demand evidence of results.
5. The 1960's brought a climate of rebelliousness and a decline of respect for authority which made teachers' jobs more difficult.

Skilled union organizers can manipulate teachers to apply union strategy at the local level to gain support for their economic, psychological, and security needs. Efforts by the board to break the union will usually increase tension and unite teachers behind the union. If the board attempts to give teachers more than the union, the union will increase its demands. Board members will find their role very frustrating until they learn to view teachers as union members and as human beings. A teacher's human and professional needs are separate and distinct from his or her security (union) needs.

If board members are to master the process of collective bargaining, they must have a clear understanding of what it is, how it affects the board, and what techniques can be used to maintain control of education in their district. Collective bargaining can be viewed by the board as a process to remove local control from the board and administrators, whereby, the control of the schools rests in the hands of the leadership of the local and state teacher unions. However, collective bargaining

can be viewed as a process by which the board can strengthen its position and reassert its authority over the policies which control the education process at the local level.

Boards of education will encounter some new roles and responsibilities when they become involved in collective bargaining. In general, the role of the board is to plan activities that will lead to a fair, equitable, and reasonable contract with the union. Planning and communication are extremely important throughout the process because board members will probably not be at the bargaining table.

Planning includes developing goals, parameters, and objectives for the negotiator or the bargaining "agent". Probably one of the most important roles of the board members is to select the negotiator who will speak for the bargaining team. Policy must be established based on the district goals so that the chief negotiator will know the bargaining packages he can offer based on the parameters established by the board.

Close communication between the board and the negotiating team is essential throughout the process. This will best be accomplished through the superintendent or his designee who will work closely with the bargaining team. Sometimes the chief

negotiator will deal directly with the board, but the total board should not negotiate directly with the teachers' or employees' union.

Individual board members should resist any impulse to act as a mediator between the union and the board unless directed by the total board to act in that capacity. There are numerous reasons for board members keeping their distance from the bargaining table besides acting in the ill-advised capacity of mediator. Most board members do not have the time or the expertise to deal in all the details of serious negotiations. Also, the personal attacks aimed at board-member negotiators cause board members to feel resentment and anger toward the union and the individuals it represents. Negotiation "experts" point out that the presence of board members can inhibit progress when negotiations become highly personal.

Once the board has selected the chief negotiator and the negotiating team, the next step in the process is preparing for negotiations. Collective bargaining requires preparation that is logical, detailed, and thoughtful. The negotiating team must be armed with all the facts available to reach the objective of securing a reasonable contract.

The National School Boards Association lists four procedural steps in preparing for negotiations: researching the existing contract; securing wage and other information; establishing parameters and positions; and planning strategy.¹⁹ The principal function of researching the existing contract is to identify strengths and weaknesses so more time and detail can be spent on the areas which will require tougher bargaining. Wage and other statistical data are important as both boards and other unions will compare the information as a measurement of success or failure in the final outcome of the contract.

The board must establish parameters and positions so it knows what it wants and how it plans on achieving those goals. During the strategy sessions, all board members and key people in the administration should be present, as well as the chief negotiator. In these sessions, the board should try to assess the union's likely position and develop priorities for negotiations. Some boards use these discussion sessions to establish each person's responsibility on the negotiating team.

Once the ground rules have been set for the negotiating process, the board's participation will usually be confined to keeping itself informed on the progress and monitoring how its

strategy is being employed. The board will need to study and respond to union proposals and suggest counter-proposals to its bargaining team. All proposals can be accepted, modified, or rejected by either negotiating team. If negotiations are successful, the board will have to approve and sign the final agreement.

Both sides are required to negotiate in good faith. The Fair Labor Standards Act prescribes legal descriptions of good-faith bargaining, but a working definition of bargaining in good faith would include the following items:

1. Meet at reasonable times and places.
2. Devote reasonable time to negotiate.
3. Come to the table with proposals and reactions to the other side's proposals after reading them.
4. Provide information necessary to intelligent bargaining.
5. Bargain reasonably.
6. Maintain prior agreements in later bargaining stages.
7. Reduce all agreements to writing.
8. Discuss all issues in detail.
9. Accept the employees' designated agent as their exclusive negotiator and do not attempt to bypass the authority of the union representative by appealing directly to union membership.

The board does not have to make concessions to union demands on any issues and should not approve and sign a contract with which it cannot live. One of the goals of the chief negotiator is to negotiate a contract which the board will ratify.

When a board agrees to sit down and negotiate with the teacher union, there is always the possibility negotiations will break down. The board and its negotiating team may be faced with demands

that seem unreasonable or with a contract which the union memberships rejects. When this state of impasse occurs, normally a neutral third party advises or directs both parties toward resolution.

The first step in impasse proceedings is usually mediation. Mediation is the entry of a third neutral party who will attempt to secure an agreement between the two parties, not make the decision for them. Mediation can be invoked at any time in negotiations when the proceedings appear to slow down. The role of the mediator is advisory, and any agreement between the two parties is the responsibility of the two parties.

The second step in impasse proceedings is fact-finding although some boards bypass this step. Fact-finding can be with or without recommendations, depending on the ground rules that were established at the beginning of negotiations. Both sides will present the facts of impasse to the third party and he will pronounce which facts are relevant to resolving the issue. There is always the possibility that either party could ignore the recommendation, but either side will feel public pressure if it adopts that position.

Arbitration is the third step in the impasse proceedings and can be binding or advisory in nature. The neutral third party

will hold a hearing on the issues and then render a final decision. Boards should be very reluctant to agree to binding arbitration since the decision made by the third party will sacrifice local control. Boards have been less reluctant to arbitrate grievances on existing contracts because they are dealing with rights rather than new issues.

Boards of education must prepare themselves for the fact that a strike is within the realms of a possibility. A plan should be devised to combat the elements of a strike. Some key points to consider are the decision to keep the schools open, security, provisions for settling the strike, and provisions for assuming business after the strike. During and shortly after the strike, board members should expect to feel some emotional trauma and be prepared to deal with it accordingly. After the strike has ended, the board member should resume the full schedule of activities which was interrupted by the strike.

Collective bargaining may be a "nightmare" to some school board members, but with preparation and proper attitude toward the process, it can be just another challenge of board membership. Depending on the size of the school district, boards will have differing roles, but the final goal is always the same. The board of education and the teachers' union must ratify a contract which is fair, equitable, and reasonable.

FEDERAL EDUCATION PROGRAMS

The federal government has contributed funds to local school districts to be used for special projects and specific areas. In most instances, the federal government contributes less than 10% of the total budget, but its contribution has helped local school districts develop programs to fight poverty, to bolster national defense, and to bring about equal educational opportunities. Federal dollars are seldom used in the general operation of the school district. They are usually earmarked for specialized programs.

One of the criticisms of federal support by local boards is the limitation imposed on the district by the giver. Guidelines, restrictions, and controls attached to federal funds have reduced the apparent value of the support due to the complexity of obtaining and disbursing the funds. Board members must decide if the money to be received is worth the time and effort to obtain it.

Boards need to understand the availability of federal funds and the general types of programs these funds support. Most federal programs will require some expenditure of local dollars to keep the programs functioning. If the budget is limited, the board must consider the alternative of eliminating the federal program when federal dollars are decreased or stopped.

Most federal funds are disbursed through the state office of education. The Illinois State Board of Education lists the following federal education programs in their abbreviated text, State, Local And Federal Financing For Illinois Public Schools, 1982-83. (See Appendix D for a detailed list of the Federal Education programs which were funded for the 1982-83 fiscal year.)²¹

EXPENDITURES

Accounting procedures require revenue to be used for specified expenditures. Boards need to have a general understanding of the different categories for expenditures so they realize where the money is being used and why. The first categorical breakdown is by the different funds which are educational, operations, building and maintenance, bond and interest, transportation, municipal retirement, site and construction, working cash, rent, and capital improvements. Most revenue is required by law to be used in one of these funds and cannot legally be used for some other purpose without proper transfer and repayment.

Board members should know the amount of money spent for salaries, employee benefits, purchased services, supplies and materials, capital outlay, and other objects. These categories might be further divided into the regular instruction programs, special instruction programs, vocational programs, interscholastic programs, administrative services, supporting services, and community services. The board of education should require the superintendent to furnish the expenditure report in detail form so that each member can have the necessary information to make wise decisions concerning financial spending.

School boards are constantly faced with the problem of balancing their revenue and expenditure accounts. Revenue for school districts has remained constant or declined slightly in recent years, but the expenditures have risen sharply. Inflation spiralled to double figures for many years during the 1970's, causing the costs for goods and services to double for many school districts. School boards have been placed in the uncomfortable position of reducing staff and eliminating programs to balance their budgets.

School districts are in the business of providing goods and services to the community they serve. Typically, a school district consists of people and buildings. In an ordinary year a school district will spend about 2/3 of its revenue to compensate employees and approximately 1/4 to heat, light, and maintain its buildings. The less than 10% of revenue remaining goes mostly for equipment and supplies. Little savings can be accomplished by cutting back on equipment and supplies. To save large amounts of money, a board of education must reduce staff or close buildings.²²

During the late 1960's and 1970's, the federal and state governments mandated new programs to help the disadvantaged and underprivileged student. These programs were beneficial and helpful to those who needed this service, but the revenue allocated by the state and federal governments has not kept up with the inflationary

costs. Expenditures associated with these special students tend to be higher than those for the average student. Board members must come to the realization that the programs are mandated by the federal government, but the local taxpayer is paying much of the expense.

Inflation has caused the cost of operating schools to reach a critical point.

According to a survey by Educational Research Service, Inc., the average cost of goods and services purchased by school districts went up 12.4% from 1979 to 1980. This would indicate a school district would spend an average of slightly over \$1.12 to buy the same goods and services purchased for \$1.00 the prior year.²³

A board of education must increase its revenue each year or see its purchasing power decline.

The dilemma facing boards who have rising expenditures and declining revenue is to lower the quality of schools or operate a deficit budget. A deficit budget is one which is out-of-balance because the expenditures exceed the revenue. Boards should adopt a deficit budget only if they feel a solution will arise in the near future. Another alternative is to cut out all the extra programs which are useful, but not essential. Class size can be increased and courses eliminated at the high school level to aid in the reduction of staff. Board members will find reductions

in staff and programs a very difficult task because of the emotional and sociological impact, as well as the host of procedural problems.

There are many cost-saving suggestions which require the board to make decisions regarding its individual school district. A thorough review of the extra-curricular activities program can sometimes point out dollars to be saved without loss of services to the students or the community. The vocational programs in some districts appear to be antiquated with little or no student preparation for future jobs. There is a growing sentiment that technical training should take place in the community colleges and trade schools rather than in elementary and secondary schools.

Board members should explore the possibility of early retirement of teachers and other certificated staff. The basis of such a plan is to offer a high-salaried employee a bonus if he chooses to retire early. Another possible savings is to share staff, facilities, and instructional materials with other school districts. Smaller districts have been doing this for years due to small enrollments in some programs, but it could be a cost-saving factor for districts which are in close proximity to each other. Due to the high energy costs, boards need to establish and review policy to maintain and operate facilities in order to eliminate as much

waste as possible.

Regardless of the financial condition of a school district, the board should insist that the superintendent furnish members with a monthly list of the expenditures. The expenditures should be categorized on a workable form which the board can understand so that proper comparisons and analyses can be made. The citizens of many communities are demanding fiscal accountability because of the economy and the financial conditions of school districts. In order to remain fiscally sound, boards need to analyze their expenditures.

CURRICULUM

The instructional program is the first and foremost reason for having a school system. It should be the concern of every student, parent, teacher, administrator, school board member, and citizen of the community. If the school is to develop well-educated citizens, the instructional program will need to be in a continuous process of improvement to meet the needs of students living in a constantly changing society. The board of education's role in curriculum issues is to think of improving student achievement when developing policies and goals affecting the instructional program.

When school boards were first established in the middle of the 1600's, they controlled and managed everything in the schools including the curriculum.²⁴ As time passed, school boards hired personnel such as superintendents to take care of the daily operations of the schools, and the interest in curriculum was not as great as long as the basics were taught. Since that time, the board's involvement in curriculum development has varied from local district to local district depending on the issues and the citizens' concerns in those communities. Some boards have stayed completely out of curriculum matters; others have become involved;

and still others have wanted to become involved but were not sure of their role.

There are several obstacles which have kept boards from becoming directly involved in developing curriculum. The boards are constantly changing and many individual members feel they do not possess the expertise or have the necessary time to make such important decisions. Budget restrictions and state mandates have predetermined the necessary requirements and have left boards few alternatives. In some school districts, board members have been divided on curriculum issues or felt resistance from the staff and administration when suggestions were made regarding curriculum. In recent years, other issues such as finance, drug and alcohol abuse, and student discipline have become pressing problems and have taken much of the board's time and energy, causing curriculum to become the responsibility of the instructional staff.

Regardless of the obstacles, the board needs to make a commitment to the curriculum and develop policies concerned with the planning, execution, and evaluation of a sound instructional program. Curriculum issues need to be discussed at each board meeting so the board members are constantly aware of the importance of the instructional program. Adequate funds must be budgeted to provide

the necessary materials and services for sound programs and board members need to ask questions about general aspects of the curriculum as well as individual subject matter areas.

As in all issues of school operations, the board must develop and implement through the administration a sound policy on the instructional program and, more specifically, the curriculum. It might be a short general policy stating the board's belief, goals, and expectations, or it might be a detailed, lengthy document dealing with everything from class size to graduation requirements. Regardless of the policy, it should state the goals and objectives in such a manner that the instructional program and the curriculum receive the necessary emphasis by everyone associated with the school system.

Most school boards strive for a curriculum which will meet the needs of as many students as possible. It is important to keep the curriculum in balance and provide programs which will best serve the many interests of the students in the community. Students will need enrichment courses as well as courses to learn the basics. All students will need guidance and counseling services, and some students will need alternative programs. Board members must listen to all special interest groups as well as the advocates of the basics, but attempt to implement policies that will

produce a well-rounded curriculum.

In developing policy or curriculum, the board will usually listen to the instructional staff, the administration, or consultants for recommendations on new programs, new courses, or new methods of instruction. It is wise to listen, ask questions, and get as much information as possible about the innovations before making any decisions. Many innovations in the past have served little purpose, and some have even proven harmful to education. Others have been proven very helpful to education and have revolutionized some of the concepts of teaching. The important question is if the new idea will promote improved student achievement and if it is in agreement with the board's goals and objectives for the instructional program.

In large school districts, a curriculum coordinator is usually employed to develop the various programs for the district and to keep the board advised on the issues of curriculum. In smaller districts, building principals are quite often the instructional leaders, especially if there is only one elementary school and one secondary school. In districts of this type, it is important for the board to see that the programs are coordinated from kindergarten through high school and are not fragmented by each building. One of the primary roles of the board is to provide leadership in

curriculum either through the administration or by appointing a committee devoted to instruction and curriculum.

Goals for instruction and curriculum must be constantly evaluated to see if they are in compliance with the changes in the local community, as well as society in general. As conditions change, a board may want to change its goals, but any changes should be developed in cooperation with the instructional staff, the administration, and the citizens of the community. Many school boards seek the suggestions and recommendations of their citizen's advisory committees on issues of curriculum, especially on controversial issues such as sex education, morality, creation and evolution theories, and patriotism.

Boards should seek to develop and implement policies that will produce a curriculum which is ideal for the educational growth of the students, but many of their objectives and goals will be stifled by controversies of special interest groups.

The board may have the best intentions concerning curriculum, but if it fails to allocate the necessary funds, its intentions will have little impact on the instructional materials, guidance and counseling services, extra class activities, field trips, remedial courses, enrichment courses, curriculum specialists or consultants, and other educational materials and services. A

board's values will be reflected in its budget. A curriculum-oriented board will allocate the necessary funds for good school libraries, classroom books and reference materials.

Another area of concern for the board is to provide the needed funds for a good year-round, in-service program for the professional staff. Veterans as well as beginning teachers need help in understanding students in our changing society. Teachers are responsible for maintaining safe and efficient classrooms as well as keeping abreast of changes in subject matter and new methods of teaching. Boards can aid the professional staff by allocating money and establishing times for workshops, seminars, and other in-service programs. Some school districts have encouraged their staff to visit nearby school districts to observe new methods and procedures in teaching. All of these in-service procedures cost money, but should pay off in large dividends with a better instructional program.

Boards have the same responsibility to curriculum as they do to finance and operations. Curriculum decisions should not be delegated to the professional staff and forgotten by the board. What is taught in the schools is the biggest concern of any school district; therefore, the board must take an active role in the development and implementation of policy for a good instructional

program. Once the program is established, the board, through administrative reports, should continually evaluate and reshape the program to meet the needs of the community it serves.

BUDGET

The budgeting process for a school system is an on-going function which involves most of the employees of the district for the entire year. The board's role in budgeting is to have a working knowledge of the components of the budget and to establish guidelines and procedures for preparation of the budget. The board will officially adopt the budget after reviewing and making the changes necessary to be fiscally solvent.

Budgeting for a school system is a process with two primary objectives: Provide all of the educational programs and services to meet state requirements and community needs, and to balance the revenue and expenses each year. Business in the private sector is strictly for profit, but a school system has the added responsibility of providing the best educational opportunities for the money available.

Appearances of the financial condition of a school system can be deceiving. Boards may be adopting budgets which provide quality programs and services but are spending more than they can afford. The opposite may be the case where the district is financially healthy, but programs and services have been cut below what the community wants or the state requires. In recent years, board

members have been faced with the dilemma of adopting a deficit budget or lowering the quality of the educational programs and services. A board member will not be able to know all of the specifics, but should understand the sources of revenue, the basic and marginal expenditures, and the procedures for setting the budget as determined by board policy.

The superintendent is usually designated as the person responsible for preparing the budget in smaller school districts. In larger districts, a business manager or an assistant superintendent would be the likely designee. Regardless of who is responsible, the board should adopt policies that establish which members of the staff are responsible for the different functions and the precise day on which the functions should be completed. The board should establish dates for presentation of a tentative budget, presentation of the formal budget, times when public hearings will be held, and the final adoption of the budget.

To understand the budget, a board member will need to know the sources of revenue to the district. Most school districts receive their revenue from local sources, state aid, and federal aid. The estimated amount that will be received from each source is essential in understanding the revenue available to the different programs. Some moneys are required by law to be used for a

designated purpose.

The tax dollar from local sources is divided by fund and can be used only for the expenditures which the law permits. Consequently, money allocated for a specific purpose must be spent for that purpose and cannot be used by another fund. Knowing which revenue can be used for which expenditures is necessary in making wise decisions on budget changes.

The superintendent should provide the board with vital statistics regarding the staff and the facilities. Such statistics would list staff by age, salary distribution, number of years of experience, and whether they are tenure or nontenure teachers. The buildings would be noted by the age of the building, the physical condition of the building, and any scheduled, major repairs and renovations. With this knowledge, board members can better acquaint themselves with two of their largest expenditures: salaries and maintenance of buildings.

Population trends in a district are vital in preparing for the future. Some projection of district population as well as school population is necessary to plan for any large increases or decreases. Sudden changes in economic conditions can attract many new families to the district or cause many families to leave the district. Without proper planning, sudden change in the school population

can create total chaos with a budget.

Other statistics vital to making wise budget decisions would include student-teacher ratios, student-administrative staff ratios, and class size. Each of the three areas should be broken down by elementary and secondary levels. These statistics would indicate any excess of administrators, teachers, or central office staff, and the possibilities of a reductions-in-force. The superintendent should report any increase or decrease in staff for the coming year and the amount of money affected by the change.

Budgets are often documents which cover many pages and go into great detail. To understand better the expenditures of a district, the board should use an outline which shows very simply where the money goes. Probably the most often used outline breaks each expenditure into per pupil cost and the percentage of the total expenditures. Accounting procedures in Illinois require the budget to be separated by funds and divided into salaries, employee benefits, purchased services, supplies and materials, capital outlays, other objects, transfers, and tuition. Since information too difficult to associate meaning has little value, the board must have a workable document for budget discussions.

A school district's budget is an organized plan, representing the financial picture of the school district. Typically a school

district will spend 50 - 60% on student instruction, 5 - 10% on student and community services, 20% on insurance, utilities, maintenance, supplies, and other fixed charges, and 5 - 15% on capital outlay, bond retirement, interest, and administrative costs. Some factors will affect the expenditures and will cause the district's budget to deviate from the typical percentages. Instructional cost will vary depending on class size and the average amount of compensation paid to each teacher. Operating costs can be different depending on the age, size, number, and energy-efficiency of the buildings from district to district. Some districts offer a larger variety of programs and services to their students and community. Other districts choose to build new buildings and pay larger percentages on bond retirement and interest. Regardless of the circumstances, most school districts spend their money in similar fashion.²⁵

Once the school board adopts the budget, it should monitor expenditures to ensure that the money is being spent as it was intended. The board should require the superintendent to provide monthly reports on the financial condition of the district and should learn if the cash expended each month is within the amount budgeted. It is especially important to check the condition of the budget near the end of the fiscal year for signs of shortages

and surpluses in major funds. Shortages and surpluses in one year's budget will affect the next year's budget. The on-going process of budgeting continues.

APPENDIX A

*STATEMENT OF PRINCIPLES AND PROCEDURES FOR
EFFECTIVE COOPERATION BETWEEN A BOARD OF EDUCATION
AND ITS CHIEF ADMINISTRATOR

Introductory Statement

The establishment of policies for the governing of a school district by the board of education and the administration of those policies by the chief administrator call for a high order of devotion, statesmanship, and integrity. It is of utmost importance for the good of the children in our schools that the board of education and the chief administrator work in an atmosphere of mutual trust and good will.

The Illinois Association of School Boards and the Illinois Association of School Administrators urge the acceptance of the following principles and procedures to promote effective cooperation in their efforts to face intelligently, the problems of their school district. It is recommended to board members and administrators that they read carefully and keep in mind always these principles and procedures.

It is to be understood that these statements are in no sense to be substitutes for, but rather to be helpful in carrying out, local policies and procedures which each board of education should establish and publish for its school district.

Principles Basic to Effective Cooperation

1. The board of education will establish such policies

for the conduct and administration of the schools as are prescribed by law and such other policies as may seem advisable and have them prepared in such form that all concerned will be aware of them.

2. The board of education will select a chief administrator who shall be the head of the school system and be directly responsible to the board for the total administration of the school district. The board will vest in him the necessary authority and provide him with appropriate personnel to carryout such administration.

3. The board of education will endeavor to give counsel and advice to the chief administrator regarding the administration of the schools as it deems necessary or expedient, remembering always that board members as individuals have no authority, and only policies voted by the board have force. The board will adopt policies only after consulting with the chief administrator.

4. The board of education will require of the chief administrator such periodic reports as the board deems necessary to keep it properly advised on the administration of the school district. The chief administrator must be frank, honest, concise, and complete in reports to the board of education. Important school matters requiring board action should be presented by the chief administrator to the board as required, not in a semi-private

way to individual members.

5. The board of education will expect from the chief administrator recommendations for the welfare of the school district. His role is to provide the educational leadership for the public school of the community.

6. The board of education will require of the chief administrator attendance at all board meetings except at times when his own employment may be under consideration, or by mutual consent he is absent for a reason authorized by the board.

7. The board of education will employ, promote, transfer, suspend, or dismiss personnel after consultation and upon recommendation of the chief administrator, and will issue all orders affecting employees through the chief administrator.

8. The board of education will endeavor to develop ways and means of serving the community and of keeping parents, patrons, and taxpayers informed of the school program, with the advice and cooperation of the chief administrator as their executive officer and professional advisor.

9. The board of education will endeavor thoroughly and constructively to orient new board members into the work of the board and the educational program of the schools, with the assistance of the chief administrator.

10. In the community, the board of education should expect the chief administrator to assume his place as a citizen with all the responsibilities which the concept of citizenship conveys. He should use his position of leadership to present the cause of pupil education honestly and forthrightly, and to further community activities compatible with and complimentary to those of the school.

11. The board of education reserves unto itself all of its legal responsibilities for the operation of a good common school, including the right to reject any and all recommendations and the right to revise its policies, rules, and regulations from time to time to meet changing conditions.

12. Under the laws of the state of Illinois, the board of education is the final authority on any controversial issue which cannot be resolved through the regularly constituted administrative channels.

13. All meetings and records of the board shall be open to the public, with an occasional exception when questions of employment or dismissal, or lawsuits, are involved, in which case the board might vote to sit as a committee of the whole in closed meeting for purpose of informal discussion.

14. The board of education and the chief administrator shall have as the basic criterion for evaluating any issue, its effect

upon the educational welfare of boys and girls.

15. The board of education, together with the chief administrator, has a moral obligation to provide such leadership and render such service as will engender trust and confidence on the part of all citizens in American public education. It is their obligation and responsibility to work together for an increasingly effective program of education for all our people, and, insofar as is required of each, to submerge personal ambition, prejudice, and desires to that end.

* Adopted by Illinois Association of School Boards and Illinois Association of School Administrators.

APPENDIX B

ILLINOIS SCHOOL BOARDS ASSOCIATION

CODE OF CONDUCT

FOR MEMBERS OF SCHOOL BOARDS

As a member of my local board of education, I shall do my utmost to represent the public interest in education by adhering to the following commitments:

1. I shall represent all school district constituents honestly and equally and refuse to surrender by responsibilities to special interest or partisan political groups.

2. I shall avoid any conflict of interest or the appearance of impropriety which could result from my position, and shall not use my board membership for personal gain or publicity.

3. I shall recognize that a board member has no legal authority as an individual and that decisions can be made only by a majority vote at a board meeting.

4. I shall take no private action that might compromise the board or administration and shall respect the confidentiality of privileged information.

5. I shall abide by majority decisions of the board, while retaining the right to seek changes in such decisions through ethical and constructive channels.

6. I shall encourage and respect the free expression of opinion by my fellow board members and others who seek a hearing before the board.

7. I shall be involved and knowledgeable about not only

local educational concerns, but also about state and national issues.

In addition, I shall encourage my board of education to pursue the following goals:

1. The development of educational programs which meet the individual needs of every student, regardless of ability, race, sex, creed, or social standing.
2. The development of procedures for the regular and systematic evaluation of programs, staff performance, and board operations to ensure progress toward educational and fiscal goals.
3. The development of effective school board policies which provide direction for the operation of the schools and delegate authority to the superintendent for their administration.
4. The development of systematic communications which ensure that the school board, administration, staff, students, and community are fully informed and that the staff understands the community's aspirations for its schools.
5. The development of sound business practices which ensure that every dollar spent produces maximum benefits.

APPENDIX C

NATIONAL SCHOOL BOARDS ASSOCIATION
A MODEL ORIENTATION PACKAGE FOR BOARD MEMBERS

SCHOOL-COMMUNITY RELATIONSHIPS
AND GENERAL RESPONSIBILITIES

1. A personal copy of written board policies and administrative rules of the district.
2. Minutes from the past year's board meetings (perhaps synopsized.)
3. An explanation of school board organization (officers, standing and ad hoc committees, if any, and so forth.)
4. A list of board member development opportunities throughout the year.
5. An explanation of how board meetings are conducted, including parliamentary procedures.
6. An explanation of the authority and responsibilities of the board, superintendent, administrators, and individual board members.
7. An explanation of how the chain of command works within the district.
8. An explanation of programs, activities, and interests of education-oriented groups and associations.
9. An explanation of the district's public relations program, how it is coordinated, and what activities regularly take place.

SCHOOL FINANCE

10. A copy of the district's budget. Explanation of how, when, and by whom it is prepared; how educational needs are translated into a dollars-and-cents plan, where the money goes, how the money is spent.

11. An explanation of your state's financial plan and what it means in terms of the local district budget.

12. Data on district per pupil cost and expenditures at both the elementary and secondary level.

13. An explanation of the assessed valuation and tax structure of the district.

14. An explanation of the funding process for the school district.

15. A description of the district's student enrollment trends and projections.

16. Data on the existing bond indebtedness of the district and when various building debts will expire.

17. Information on federal aid to your district's education program.

SCHOOL CURRICULUM AND INSTRUCTION

18. A copy of the school district's written statement of educational philosophy.
19. A copy of the district's latest needs assessment results.
20. An explanation of curriculum standards required by state law and implemented by rules of the state department of education.
21. Copies of recent evaluations from the state department of education or regional accrediting agencies.
22. An explanation of the district's overall curriculum program.
23. An explanation of the educational organization of the school district, including student groupings, departmentalization, team teaching, and shared pupil/teachers.
24. An explanation of how elementary and secondary curricula are coordinated.
25. Student drop-out statistics.
26. Information on standardized testing, recent test results, and the utilization of test results.
27. Data on the percentages of students who go on to college or other post high school programs.
28. Documents showing teacher-pupil ratio and median class

size for the district and for appropriate sub-groupings.

29. An explanation of the district's program for exceptional children: those with higher or lower than normal mentality, impaired sight or hearing, and emotional, neurological, and other problems.

30. Data on the age and condition of textbooks and school equipment.

31. A description of libraries and instructional materials centers in use, new, or planned for the future.

32. A statement of the board's philosophy regarding extra and co-curricular activities in the district.

ADMINISTRATION AND STAFF

33. A copy of job descriptions of the superintendent, board secretary, treasurer, and top administrators.

34. An organization chart of the school district's management structure.

35. An explanation of recruitment procedures.

36. A copy of staff salary schedules and fringe benefit programs, including data on average and median salaries of teachers and school administrators.

37. Data on staff-administrator ratios.

38. A copy of the district's collective bargaining agreements, if any, and a brief history of recent collective bargaining activities in the district.

39. An explanation of the district's evaluation criteria and procedures for administrators, teachers, and support staff.

40. An explanation of the district's orientation program for new teachers.

41. An explanation of the district's staff development program.

SCHOOL DISTRICT FACILITIES

42. A list showing the number, location, and condition of schools and other buildings owned or operated by the district.

43. An explanation of construction projects contemplated and in process.

44. A description of the district's building maintenance program.

WHAT A BOARD MEMBER CAN DO .

TO GET THE MOST OUT OF A BOARD MEETING

45. Do your homework. When you get the agenda and back-up materials, read them and be prepared to contribute to the discussion.

Plan your questions in advance and jot them down before coming to the meeting.

46. If you do not get the information you need, check with the superintendent or the board president before the meeting.

47. Try to know in advance what is expected of you. Be prepared to make any presentation expected.

48. Organize your papers before arriving at the board room. Bring everything you need.

49. Arrive on time.

50. Keep the board agenda and objectives in mind.

51. Do not spring any "surprises" on the board.

52. If you are unprepared, do not fake it. If others are obviously unprepared, but are debating the issues anyway, try to cut them off as diplomatically as possible (A motion to table is one method.)

53. Work to reach agreement on the issues and come to a decision. If the discussion becomes belabored, try to summarize and encourage action.

54. Avoid having a hidden agenda - saying one thing and meaning another.

55. Avoid espousing personal philosophies.

56. Do not attack personalities; attack problems.

57. Keep your eyes open. If, in mid-sentence (or mid-argument), you realize that everybody around you is either glaring at you, blushing for you, or packing up to go home, take the hint and stop talking.

58. Do not dominate discussions.

59. Broaden your concerns. No matter what special interest group encouraged your election or appointment, once on the board, you should cast your votes according to your conscience. Vote with the knowledge that, as a board member, you almost always know more sides of an issue than your constituents do.

60. Do not debate issues with members of the audience.

QUESTIONS NEW BOARD MEMBERS SHOULD ASK

61. What does your board do for your school district? What should your board do that it does not do now?

62. What changes has your district undergone in the past 2 years? 5 years? 10 years? What plans are being made to manage these changes?

63. What are your district's major objectives this year?
Next year?

64. How does your board go about setting goals and objectives for the district? What planning procedures does it follow?

65. If your district could accomplish one major objective next year, what would you want it to be? If the board agrees with you, does it have a plan that would accomplish it? If not, who can help you devise and implement such a plan?

66. What skills and knowledge do you bring to the efforts of your board? What can you do to overcome any deficiencies in skill or lack of knowledge that you may have? Does your district provide for the orientation and development of board members?

67. Has your board taken full advantage of the materials and programs available from your state school boards association? From the National School Boards Association?

68. In the last year, what policies has your board adopted? Why were these adopted?

69. In the last year, has your board rejected a proposed policy? If so, what was the issue? Why was it rejected?

70. When was the last time your board reviewed its policies?

71. In your judgment, should your board give more or less attention to policy making than it does? Why?

72. How does your board know whether its policies are implemented in the schools?

73. What are the ground rules in your district for determining what is "board business" and what is "staff" work?

74. Is your district managed by an administrative team? If so, who's on it? Who controls it? How does it function? How does your board interact with it?

75. How does your board evaluate administrative efforts?

76. How are school programs evaluated?

77. How is legal advice provided to your district? How does your district use this advice?

78. How is the agenda for each board meeting set?

79. Does your board comply with applicable "Sunshine" laws when it addresses matters in its executive sessions? Can the types of concerns discussed legally take place behind closed doors?

80. Can you identify the major state laws that affect the work of your board?

81. Can you list several federal mandates that affect board decisions?

82. How does your board collectively participate in state and national legislative deliberations? What is the relationship of your board to your state school boards association's legislative activities?

83. How does your board participate in budget preparation?

84. Have the district's recent bond issues been successful?
Why? Why not?
85. What major budget cuts have been made within the last two years? Why?
86. How does your board participate in setting the salaries of teachers and other school employees?
87. What staff development opportunities are provided to school employees?
88. How does your board influence the school curriculum?
89. What can you do personally to help ensure good working relationships between yourself and other members of your board?
The superintendent? Other staff members?
90. Does your board use standing or "ad hoc" committees?
If so, what are their responsibilities? What impact do committee recommendations have on board decisions?
91. In what ways does your board communicate with the public?
School employees? The press?
92. Does your district have citizen advisory committees?
What do they do?
93. How does your board respond to complaints from citizens?
What should you do when a citizen complains to you about a school related matter?

94. If your district engages in collective bargaining, what role does your board play?

THE MOST DIFFICULT THINGS
TO LEARN ABOUT BOARD SERVICE

95. Determining what your function is on the board and how to accomplish it effectively.

96. That no matter what you think you know about board service when you first come on board, you still have a lot to learn.

97. Learning to publicly acknowledge that you have no power and authority as an individual board member; that only the board as a whole can make policies and decisions for the school district.

98. Recognizing the difference between setting policy (the board's job), and administering the school (the superintendent's job).

99. That you must represent all the students. Your decisions must be made in the interest of the total school system and not made solely for special groups or interests.

100. Learning how to respond to the complaints and concerns of citizens, school administrators, and other staff.

101. That change comes slowly.

102. That you can't solve everyone's problems by yourself.

103. That you must think deeply and sometimes accept a reality that is contrary to your own beliefs.

104. That effective boardsmanship means being able to hold the minority viewpoint when voting on a given issue; then openly supporting the majority vote in your community.

105. Discovering how the schools are funded.

QUESTIONS BOARD MEMBERS SHOULD ASK THEMSELVES
ABOUT THEIR RELATIONSHIPS WITH THE SUPERINTENDENT

106. Do you think you have a good understanding of your role and authority as a board member?

107. Can you differentiate between your responsibility and authority and that of your superintendent?

108. If asked to describe how your superintendent spends most of his days, could you accurately do so?

109. Can you identify the issue, problem, or project that most concerns your superintendent at this time?

110. Do you openly respect and trust your superintendent?

111. Do you publicly give the superintendent your support and encouragement?

112. Do you privately discuss problems involving the school system with the superintendent and avoid surprising or embarrassing him with statements or questions at board meetings?

113. Do you keep all confidences shared by your superintendent?

114. Do you communicate your expectations of the superintendent directly to him?

115. Do you do your homework before coming to board meetings?

116. Do you know the procedure for handling complaints, and do you use this procedure?

117. Do you avoid bypassing the superintendent by dealing with subordinates on issues?

118. Do you refrain from making personal commitments to constituents as an individual board member?

119. Do you seriously consider and weigh all recommendations the superintendent makes?

120. Can you honestly say you make your decisions based on the information provided, and not on any preconceived ideas?

121. Do you ask the superintendent only for the information you really need to make a decision on an issue?

122. Do you accept and approve most personnel recommendations made by the superintendent?

123. Do you think having good rapport with the superintendent is important?

124. Can you be friendly with the superintendent and respect his opinions, even when you disagree with him?

125. Do you usually tell the superintendent what is on your mind before you tell it to everyone else?

APPENDIX D

FEDERAL EDUCATION PROGRAMS

Federal funding available to local education agencies and the Illinois State Board of Education for the federal education programs is presented in this chapter. A financial summary, detailing approximate amounts available for Illinois schools and for state administration of programs during Fiscal Year 1983, is provided.

Federal Fiscal Year

The Federal fiscal year is October 1 through September 30. However, programs previously funded on a school-year basis continue to be funded by the school year.

Education Consolidation and Improvement Act, Chapter 1, P.L. 97-35, Educationally Deprived Children Grants to Local Education Agencies. Grants were made to operate some 840 projects which are designed to reduce or eliminate the educational deficiencies of eligible Chapter 1 students in the State during the 1983 fiscal year. Local education agencies use the funds to provide supplemental educational opportunities determined to be of high priority through local needs assessments. Most programs are in the areas of reading, mathematics, and cultural enrichment. The FY 1983 grant of about \$106.5 million is divided by the number of eligible children (383,207) to obtain the allocation of \$277.95 per pupil (statewide average).

In early September, 1982, the United States Congress overrode the President's veto on an appropriation bill. As a result, some states, including Illinois, will receive additional Chapter 1 funds during Fiscal Year 1983. Illinois should receive approximately \$14 million in additional funds due to this congressional override. For further information, contact Mr. Robert Hardy, Manager of Compensatory Education, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-6035).

Education Consolidation and Improvement Act, Chapter 1, P.L. 97-35, State-Operated Programs for Handicapped Children. Public Law 89-313 is a project-oriented, child-centered, federal program designed to provide financial assistance to initiate, expand, and improve special education and related services to handicapped children in state-operated schools, state-supported schools, and local educational agencies that meet certain eligibility conditions. Grants awarded during Fiscal Year 1983 total \$23.2 million. Approved projects must meet size, scope, and quality requirements and must be designed to provide concentrated educational services for a limited number of eligible handicapped children. Grants are determined by the count of eligible children and are not competitive, but are awarded based upon approved application. For further information, contact Mr. Joe Fisher, Assistant Superintendent, Department for Specialized Services, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-6601).

Education Consolidation and Improvement Act, Chapter 1, P.L. 97-35, Migrant Children. Grants are made to the state educational agency for providing technical assistance and funds to local school districts and community agencies which develop supplemental educational programs to meet the unique needs of children of itinerant agricultural workers and agricultural workers who have settled out of the migrant stream. Approximately 3,000 interstate and intrastate migrant children and 750 former migrant children will be provided these services during Fiscal Year 1983 at a cost of \$1.7 million. For further information, contact Mr. Aurelio Jazo, Assistant Manager of Compensatory Education, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-6035).

Education Consolidation and Improvement Act, Chapter 1, P.L. 97-35, Neglected and Delinquent Children. Funds are provided to the Illinois State Board of Education for planning, development, and implementation of supplementary educational programs, in qualifying state and private institutions for neglected or delinquent children. The focus of educational activities is on reading, mathematics, and communication skills. Approximately \$1.1 million will be expended during Fiscal Year 1983 for the implementation of about 32 projects. For further information, contact Mr. Tom Grayson, Compensatory Education, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-0258).

Education of the Handicapped Act, Part B, P.L. 94-142. P.L. 94-142 was enacted to include provisions for grant funding to: (1) assure that all handicapped children have a free, appropriate public education available to them; (2) assure that the rights of handicapped children and their parents are protected; (3) assist states and localities to provide for the education of handicapped children; and (4) assess and assure the effectiveness of efforts to educate such children.

Public Law 94-142 began its first year of implementation in Illinois during Fiscal Year 1978. The maximum amount of the grant a state is entitled to under this act in any fiscal year is equal to the number of handicapped children in the state, ages three through 21, who are receiving special education and related services, multiplied by the applicable percentage of the average per pupil expenditure in public schools in the United States.

Beginning Fiscal Year 1979, 75 percent of this annual grant has been designated to flow to local school districts based upon their census of handicapped children. The remaining 25 percent is designated as state discretionary funds. These discretionary funds have been disbursed primarily to implement regional resource centers, supplemental room and board fees for children placed in private facilities, and state administration. The grant award of this program for Fiscal Year 1983 is \$50,744,287. Public Law 94-142 also included provisions for implementation of incentive grants to assist in the education of handicapped children ages three through five. Approximately 150 cooperative projects that provide supplemental programs and services to eligible handicapped preschool children will be continued during Fiscal Year 1983. The preschool grant award for Fiscal Year 1983 is \$2,151,402. Additional discretionary project proposals may be implemented. For further information, contact Mr. Joe Fisher, Assistant Superintendent, Department for Specialized Services, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-6601).

Education of the Handicapped Act, Part C, Deaf/Blind Services. Some \$400,000 was appropriated to Illinois for programs and services to deaf/blind children. Seven projects providing such specialized educational services as diagnostic, consultive, and direct services components were awarded. For further information, contact Ms. Gail Lieberman, Manager, Department for Specialized Services, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-6601).

Transitional Program for Refugee Children, P.L. 96-212. The Refugee Act of 1980 provided grants to local educational agencies, through the state educational agencies, to provide public educational services to refugee children who entered the country on or after October 1, 1979, and who are within the age limits of which the State of Illinois is required to provide free public education. Non-profit private elementary and secondary schools are also eligible for funding under the same criteria through public school services. During Fiscal Year 1983, an anticipated grant award of approximately \$1 million is expected to be disbursed to local educational agencies serving eligible pupils. For further information, contact Mr. Frank Llano, Bilingual Education Section, Illinois State Board of Education, 188 West Randolph Street, Chicago, Illinois 60601 (Telephone: 312/793-3850).

Education Consolidated and Improvement Act, Chapter 2. P.L. 97-35. Under the Chapter 2 program, federal legislation consolidated 42 previously authorized educational programs and subprograms into one federal program. Funds were allocated to the States under a formula that considered enrollment and the number of economically disadvantaged students.

The Chapter 2 program within Illinois has had \$21.5 million appropriated for implementation of the Act in Fiscal Year 1983. Of the funds, \$16.9 million has been allocated to local school districts for the benefit of public and nonpublic students through a formula based 70 percent on enrollment and 30 percent on the number of economically disadvantaged students enrolled. The formula will be applied to the number of public and nonpublic students in a school district. School districts will receive \$5.80 per student based upon their 1981 fall enrollments. Also, school districts will receive an additional \$14.45 for each economically disadvantaged student. The number of economically disadvantaged students within a school district will be taken from the 1970 U.S. Census data.

Also, the State Board of Education will award grants in aid to school districts for developing solutions to local educational concerns. The competitive grants will provide about \$600,000 for major contractual awards and mini-contractual awards.

These competitive grants will assist school districts to:

- develop or adapt innovative solutions to local educational needs,
- establish model educational or school management programs,
- develop activities that address specific student populations or classroom needs.

The remainder will be used by the Illinois State Board of Education for administration of the program (\$.6 million) and to support direct services to local educational agencies (\$3 million).

For further information, contact Dr. James Mendenhall or Warren Lionberger, Educational Innovation and Support Section, N-253, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-3810).

Elementary and Secondary Education Act, Title VII, Bilingual Education. Federal Bilingual grants are provided to local educational agencies to develop and implement preschool, elementary, and secondary bilingual/bicultural programs designed to meet the educational needs of children with limited English-speaking ability.

Federal bilingual funding is being provided to the Chicago, Harvey, and Rochelle school districts during Fiscal Year 1983. All Title VII grants are competitive and must be submitted to the Office of Bilingual Education, U.S. Department of Education, by the spring of each year. For further information, contact Ms. Maria Seidner, Manager of Bilingual Education, Illinois State Board of Education, 188 West Randolph Street, Chicago, Illinois 60601 (telephone: 312-793-3850).

Dr. Robert Lyons, Deputy Superintendent in the Chicago office, Illinois State Board of Education, may also be contacted for assistance (telephone: 312/793-2221).

Civil Rights Act of 1964, Title IV, Section 403, 404, 405,; P.L. 88-352, as Amended - National-Origin Discrimination. This program will provide inservice training workshops and technical assistance to local educational agency staff responsible for desegregation programs enrolling national origin minority students. Program development assistance will also be provided to local educational agencies and institutions of higher education which are implementing special education programs addressing the needs of handicapped, national-origin minority students. The status of high school bilingual education programs will be surveyed with a view toward reducing the dropout rate of national origin minority students.

Local educational agencies, institutions of higher education, public, and private organizations may request technical assistance. For further information, contact Ms. Maria Seidner, Manager, Bilingual Education, Illinois State Board of Education, 188 West Randolph Street, Chicago, Illinois 60601 (telephone: 312/793-3850).

Dr. Robert Lyons, Deputy Superintendent in the Chicago office, Illinois State Board of Education, may also be contacted for assistance (telephone: 312/793-2221).

Section 405 of the General Education Provisions Act as Amended by the Educational Amendments of 1976, P.L. 94-482. The Illinois Resource and Dissemination Network (IRDN) coordinates the delivery of resources and services by collecting, assimilating, developing, and disseminating information from which local education agencies and Illinois State Board of Education programs can solve educational problems or meet educational needs.

IRDN has developed the Illinois Databank, a system for coordinating information statewide, which is computerized and searchable on the PLATO computer system through the University of Illinois. The databases include information on promising programs/practices, educational documents, human resources, and youth services agencies.

A resource retrieval service of the Illinois Databank and of over 130 databases of the DIALOG information system is available at no charge from the East Central Illinois Center for Educational Improvement (ICEI) in Decatur. During 1981, the ICEI answered 4,928 requests for information from Illinois school district personnel.

Services are available to Illinois K-12 educators. Further information about IRDN is available from Dr. Lawrence K. Werner, Program Planning and Development, 100 North First Street, Springfield, Illinois 62777 (Telephone: 217/782-0762).

School Assistance in Federally Affected Areas, P. L. 81-815. Public Law 81-815 provides assistance to school districts for the construction of school facilities urgently needed because of substantially increased enrollments resulting from federal activity or loss through a major disaster. For further information, please contact Mrs. Ann Becker, Finance and Reimbursements Department, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-5874).

School Assistance in Federally Affected Areas, P.L. 81-874. Initiated during the early 1950s to compensate school districts for the loss of property tax revenues due to increased federal activity, P.L. 81-874 will provide 15 Illinois school districts with approximately \$4.9 million in Fiscal Year 1983. The education amendments of 1974 expanded P.L. 81-874 to include reimbursement for pupils in federally supported public housing projects. Additional Illinois school districts are eligible for funds under this legislative change. For further information, please contact Mrs. Ann Becker, Finance and Reimbursements Department, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-5874).

Federal National School Lunch Act and Child Nutrition Act, as Amended.

School Lunch Program. This is a voluntary program open to all public schools, private schools, and residential child care institutions which agree to operate a nonprofit program, offer school lunch meals meeting federal requirements to all children in attendance, and protect the anonymity of students eligible for free or reduced-price meals. The federal lunch requirement is designed to provide one-third of the students' daily nutritional requirements. To enable schools to provide low-cost lunches to students, a flat rate of reimbursement is paid on all lunches meeting these requirements. Additional reimbursement is paid for lunches served to students eligible for free or reduced-price meals. Approximately \$107 million has been allocated to this program for Fiscal Year 1983.

The federal income guidelines for free and reduced-price meals during Fiscal Year 1983 are as follows:

Income Guideline Levels

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Family Size	Free Meals and Milk	Reduced-Price Meals
1	\$ 6,080	\$ 8,660
2	8,090	11,510
3	10,090	14,360
4	12,090	17,210
5	14,090	20,050
6	16,090	22,900
7	18,100	25,750
8	20,100	28,600
Each Additional Family Member	2,000	2,850

Local authorities may utilize either the family income during the past 12 months for farmers and/or self-employed individuals or the family's current income level for determining the best indicator of need for free or reduced-price meals. Unemployed persons' families are eligible for free or reduced-priced meals as of date of unemployment.

Federal reimbursement rates for all lunches, reduced-price lunches, and free lunches for the period July 1, 1982, through June 30, 1983, are as follows:

For sponsors with less than 60 percent of the lunch program participants receiving free and/or reduced-price lunches (severe need) reimbursement for base-paid lunches, reimbursement will be 64 cents for reduced-price lunches and \$1.04 for free lunches. These amounts are in addition to the 11 cents in federal funds provided for all lunches.

For sponsors having 60 percent or more free and reduced-price lunches, reimbursement rates will be 13 cents for all base-paid lunches, 64 cents for reduced-rate lunches, and \$1.04 for all free lunches served.

One of the new provisions is that the maximum charge to the child for a reduced-price lunch is 40 cents. In addition, Illinois provided a state reimbursement of 15 cents for each free lunch served to an eligible child.

School Breakfast Program. Federal breakfast programs are voluntary programs open to all public schools, private schools, and residential child care institutions which agree to operate a nonprofit program, offer breakfast meals meeting federal requirements to all children in attendance, and protect the anonymity of students eligible for free or reduced-price meals. To enable schools to provide low-cost breakfasts to students, a flat rate of 8.75 cents for base-paid breakfasts, 21.25 cents for reduced-price breakfasts, and 51.25 cents for free breakfasts will be made. In addition, Illinois provided a state reimbursement of 15 cents for each free breakfast served to an eligible child. A new provision is that the maximum charge to the child for a reduced-price breakfast is 30 cents.

Special Milk Program. This is a voluntary program open to all public schools, private schools, residential child care institutions, day care centers, and camps which agree to operate a nonprofit milk program and do not have a federal feeding program. The intent of the program is to encourage and establish the habit of drinking fresh, fluid milk as a nutritious beverage. It is available to persons less than 21 years of age. Reimbursement is provided to participating sponsors for all milk served; the one-half pint reimbursement rate is 9.25 cents. In addition, milk served free to eligible needy children is reimbursed at the average dairy charge. The Fiscal Year 1983 appropriation for this program is \$4 million.

Summer Food Service Program for Children. This is a voluntary program open to all public schools, private schools, and residential child care institutions not participating in the National School Lunch Program, child care facilities not participating in the Child Care Food Program, and state, local, municipal, or county government entities which desire to operate a program during the summer months. The intent of the program is to replace the National School Lunch and School Breakfast Programs during the summer months for those children who normally, during the regular school year, would receive meals under one of these programs. The program is primarily directed toward children in needy areas to insure adequate nutrition on a year-round basis. If it can be documented that one-half of the children in that area are eligible for free or reduced-price meals during the regular school year, then all children in the area may receive free meals. All meals served are reimbursed as free meals. In addition, additional reimbursement is available to assist sponsors to cover administrative costs incurred in operating a summer feeding program. Approximately \$3.8 million has been appropriated for this program during Fiscal Year 1983.

Child Care Food Program. This program is designed to encourage the serving of nutritious meals to children attending day care centers. It is a voluntary program open to all not-for-profit, nonresidential, family and group day care homes, day care centers, Head Start and child care programs, outside of school hours. Sponsors wishing to participate must be licensed and must be federally tax-exempt. A flat rate of reimbursement is provided for all meals served. Additional reimbursement is paid for meals served to students eligible for free or reduced-price meals. Meals eligible for reimbursement under this program are breakfasts, a.m. and p.m. supplements, lunch, and suppers. Approximately \$13.5 million has been appropriated for Fiscal Year 1983.

Food Service Equipment Assistance Program: This program is designed to assist schools and day care centers in initiating and/or expanding existing food service facilities by providing grants for part of the equipment costs. Federal reimbursement is provided to schools or day care centers that participate in the National School Lunch Program, School Breakfast Program, or the Child Care Food Program. Priority for the receipt of funds is based upon economic need and/or the type of food service available in the program requesting the funds. Approximately \$500,000 has been appropriated for Fiscal Year 1983.

Food Distribution Program. The Food (Commodity) Distribution Program is designed to help reduce the cost of meals to participating organizations and to achieve maximum utilization of agriculture surplus. This is a voluntary program open to all public and private schools, institutions, and summer food service programs. The commodity value for each meal in which government-donated commodities are made available to participating sponsors is based on a cents-per-meal basis.

Nutrition Education and Training Program, P.L. 95-166. The Nutrition Education and Training Program developed in Illinois includes four basic goals which reflect the federally developed goals. These are: 1) facilitating a nutrition education process which permits Illinois children to make informed food choices during their formative years; 2) enhancing the ability of teachers to integrate sound nutrition information into the curriculum utilizing innovative teaching techniques at each grade level; 3) delineating and strengthening the role of the school food service personnel in the food service and nutrition education process; and 4) identifying, compiling, evaluating, developing, and providing nutrition education curriculum materials to educational institutions. During Fiscal Year 1982, the program served 288,989 pupils, 9,019 teachers, and 1,799 school food personnel. The Illinois State Board of Education has funded three regional projects for the 1982-1983 school year.

The projects receive grants based upon a submitted proposal. These centers offered the program a very effective network to provide resources and services to local schools and districts. In this way, Local Educational Agencies (LEA's) can develop programs and receive assistance designed to meet their unique needs. The Fiscal Year 1983 grant awarded this program is to be announced. For further information, contact Dr. Lynn Wharton, Program Planning and Development, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-2826).

Vocational Education Act of 1963, as Amended by Title II of the Education Amendments of 1976, Public Law 94-482 -- Consumer and Homemaking. This program is to prepare persons for their roles as homemakers and wage earners. The secondary school programs enrolled 44,650 students in Fiscal Year 1981. The adult program had two major components for Fiscal Year 1982 in which: 1) program assistants visited 2,198 families to assist in improving homemaking skills and 2) community workers conducted group conferences for 3,987 homemakers.

The adult program is conducted in cooperation with the University of Illinois, Cooperative Extension Service, Home Economics Division, and is operational in two counties and two sites in Chicago. A minimum of one-third of the state's allotment must be expended in economically depressed areas which have high rates of unemployment.

Local education agencies, public community colleges, colleges and universities may apply for grants. Applications, submitted through one- and five-year plans for vocational education, are due April 30.

For additional information, contact Ms. Louise M. Dailey, Department of Adult, Vocational and Technical Education, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-4877).

Vocational Education Amendments of 1963, as Amended by Title II of the Education Amendments of 1976, Public Law 94-482 -- Vocational Education Program Improvement and Supportive Services. This program is designed to improve the vocational education delivery system at the secondary, post-secondary, and university levels. Funds are available for projects in applied research, curriculum development, preservice and inservice training, exemplary and innovative programs, and projects to eliminate sex bias in vocational education programs. Education agencies, both public and private, and other parties or organizations may apply for grants.

Requests for program improvement proposals in vocational education are distributed in the spring of each fiscal year. For further information, contact Dr. John Washburn, Department of Adult, Vocational and Technical Education, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-4620).

Titles I, II, IV, and VII of the Comprehensive Employment and Training Act (CETA) of 1978, as Amended, Public Law 95-524. The Education/CETA Linkages Project is designed to introduce additional flexibility into the educational system for serving the special needs of disadvantaged clients and to assist the CETA system to more effectively prepare disadvantaged clients for entry into the job market. These objectives will be accomplished through the development of linkages between the two systems. These linkages include:

1. increasing communication, interaction, and planning between CETA and education programs and services;

2. sharing resources such as facilities, consultants, instructional materials, equipment, staff, support services, teaching capabilities, or on-the-job training stations;
3. jointly working to solve mutual problems; and
4. jointly providing new and/or improved educational programs and supportive services.

xtensive interagency coordination at the state and federal levels will also e a major component of this project. Approximately \$885,000 was appropriated for Fiscal Year 1983 programs.

ocal educational agencies, private elementary and secondary educational agencies and CETA administrators and program operators may apply for grants. For further information, contact Mr. Lonnie Hart, Department of Adult, Vocational and Technical Education, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-5098).

Career Education Incentive Act, Public Law 95-207. These federal funds are for developing, implementing and/or expanding projects designed to assist local Educational Agencies to design and offer career education programs, concepts, and services. A career education dissemination/demonstration program has been developed and includes seven locally based career education resource centers. Approximately \$475,000 was appropriated for Fiscal Year 1983 programs. Local educational agencies and private nonprofit schools enrolling kindergarten through grade 12 students may apply for grants and request technical assistance from these centers. For further information, contact Mr. Lonnie Hart, Department of Adult, Vocational and Technical Education, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-5098).

Title II, Section 204 of the Comprehensive Employment and Training Act (CETA) -- Public Law 93-203, as Amended by Public Law 95-524. The Illinois State Board of Education annually enters into an interagency agreement with the Department of Commerce and Community Affairs to administer the six percent Governor's Special Grant. The Illinois State Board of Education develops nonfinancial agreements with CETA prime sponsors to provide vocational educational training to the economically disadvantaged through contractual arrangements with public and private educational entities. The Illinois State Board of Education is responsible for program planning and development, contract negotiations and administration, and program monitoring. Approximately \$3.6 million was appropriated for Fiscal Year 1983.

Local educational agencies, community colleges, universities, private schools, and community-based organizations apply directly to local prime sponsors to develop a vocational training program for CETA clients. Programs can be initiated any time during the year at the direction of the prime sponsor. For further information, contact Mr. Delmar Slagell, Department of Adult, Vocational, and Technical Education, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-4862).

Title II of the Comprehensive Employment and Training Act -- Public Law 93-203 as Amended by Public Law 95-524. The prime sponsor for the City of Chicago, the Mayor's Office of Employment and Training (MET), contracts with the Illinois State Board of Education to administer CETA Title II funds received from the United States Department of Labor for occupational training in regard to labor demands as determined by the Chicago Private Industry Council.

The Illinois State Board of Education provides technical assistance to the MET prime sponsor and has responsibility for program planning and development, contract negotiation and administration, and program monitoring. An additional responsibility is to assist the MET with the collection of extensive data for their management information system. Approximately \$8.3 million has been appropriated for the program during Fiscal Year 1983.

Local educational agencies, community colleges, private schools, and community-based organizations may apply to develop a vocational training program for CETA clients. Applications are accepted any time during the year. For further information, contact Mr. Delmar Slagell, Department of Adult, Vocational and Technical Education, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-4862).

Vocational Education Act of 1963, as Amended by Title II of the Education Amendments of 1976, Public Law 94-482 -- Special Needs. In Fiscal Year 1982, 72 Work Experience and Career Exploration Programs (WECEP) were conducted at 54 local educational agencies for about 2,128 full-time 14- and 15-year-old students who were academically disadvantaged, needed motivation to stay in school, and had potential for placement in a work/training site. Program evaluations showed that nearly 70 percent of the students improved in their attendance and grade-point averages.

The Early School Leavers (ESL) programs assist high school dropouts who are unsuccessful in finding employment. The students receive information on careers, assistance in developing employment survival skills, and on-the-job experiences for developing marketable skills. In Fiscal Year 1982, 13 community colleges provided twenty ESL programs for 610 school dropouts. The General Education Development (GED) program was successfully completed by approximately 50 percent of these students. Thirty-five percent of the ESL students also enrolled in additional courses. Evaluation reports showed that 78 percent of the Fiscal Year 1981 ESL students were gainfully employed by the end of the year.

Three special cooperative programs for the handicapped were conducted in Fiscal Year 1982. A total of 122 students enrolled in these programs designed to provide training for entry into the world of work. Approximately 75 percent of these students became gainfully employed as a result of participation in the program. For further information, contact Mr. John A. Klit, Department of Adult Vocational, and Technical Education, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-4876).

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Vocational Education Act of 1963, as Amended by Title II of the Education Amendments of 1976, Public Law 94-482. Vocational education funds are allowed to local educational agencies throughout the State to support programs for persons who desire and need education and training for employment. Instruction is provided for occupations related to the following areas: agriculture; business, marketing and management; health; home economics; and trades and industry. Instruction includes classroom, shop and laboratory activities and supervised, cooperative education experiences.

During Fiscal Year 1982, 568 secondary and unit districts, 32 area vocational centers, 44 community college districts, two universities and three state agencies provided vocational education programs. During Fiscal Year 1981, 850,930 persons were served in vocational and adult programs. The total includes 520,920 secondary, 304,028 post-secondary and 31,982 adult students served at secondary institutions. The total included 218,618 disadvantaged, handicapped and limited English-proficient students. Funds were allocated to support special services to enable these students to achieve success in their vocational programs.

An April 1981 survey of FY 1980 vocational students revealed that vocational education is a significant factor in increasing opportunities for employment. For example, only four percent of the post-secondary and ten percent of the secondary program completers were unemployed and seeking employment. The summary of the ratings of employers of former students showed their relative preparation to be higher than those employees who had no vocational training.

Local educational agencies, community colleges, area vocational centers, and state agency institutions may apply for grants and request technical assistance through programs. Applications are to be received by April 30 of each year. For further information, contact Mr. John Klit, Department of Adult, and Vocational, and Technical Education, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-4876).

Adult Education Act -- Public Law 91-230, as Amended. This program is designed to provide instruction for adults, 16 years of age and older, who are not otherwise enrolled in school to complete high school diploma requirements or to prepare for the General Educational Development (GED) test. These funds also support basic education instruction, the English as a Second Language program (ESL) and courses for adults to complete competency-based education programs.

In Fiscal Year 1982, approximately 65,465 adults were enrolled in 85 agencies participating in this program. Nearly all enrollees completed studies leading to completion of secondary level education and/or attended an advanced training program or qualified for advanced job placement.

The number of subcontracts to be established in Fiscal Year 1983 will be approximately the same as for Fiscal Year 1982 due to the state level of funding. Local educational agencies and public community colleges may apply for grants. The recommended application deadline is at least four weeks before the beginning of the program. For further information, contact

Mr. William E. Reynolds, Manager, Department of Adult and Continuing Education Section, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-3370).

Social Security Act, Title I, Public Law 87-543; Title XX, 42 U.S.C., Public Law 95-171. The Illinois State Board of Education contracts with the Illinois Department of Public Aid to administer subcontracts with public agencies to provide education training services for welfare recipients. These services are provided to clients who have been determined eligible by the Illinois Department of Public Aid.

This program is designed to provide instruction for adults to complete high school diploma requirements or to prepare for the General Educational Development (GED) test. These funds also support the English as a Second Language (ESL) program and courses for adults to complete competency-based education programs. Vocational skill classes are also offered to improve client employability.

The primary focus of this program is to assist clients to obtain, retain, or improve their employment and reduce their dependency on welfare.

Local educational agencies and public community colleges may apply to develop an education and training services program for welfare recipients. The recommended application deadline is at least four weeks before the beginning of the program.

For further information, contact Mr. William E. Reynolds, Manager, Department of Adult and Continuing Education Section, Illinois State Board of Education, 100 North First Street, Springfield, Illinois 62777 (telephone: 217/782-3370).

Civil Rights Act of 1964, Title IV., Section 403 P.L. 88-352. -- Race Desegregation. The purpose of this program is to render technical assistance to school district personnel in the preparation, adoption, and implementation of plans for the desegregation of public schools. Such technical assistance may include making available to school districts information regarding effective methods of coping with special educational problems occasioned by desegregation and making available to them persons specially equipped to advise and assist them in dealing with such problems. The Fiscal Year 1983 grant award for this program is \$266,821. For further information, contact Ms. Pat Wofford, Manager of Equal Educational Opportunity Section, Illinois State Board of Education, 188 West Randolph, Chicago, Illinois 60601 (telephone: 312/793-3226).

Civil Rights Act of 1964, Title IV, Section 403, Sex Desegregation. The purpose of this program is to facilitate the implementation of sex equity in Illinois' elementary and secondary schools through the provision of technical assistance services. Such services are available free to requesting educators, students, parents, and community groups and may include interpretation of federal and state sex equity laws, consultations regarding effective implementation of sex equity in the schools, provision of training or resource materials, etc. The Fiscal Year 1983 grant award for this program is \$257,154. For further information, contact Ms. Pat Wofford, Manager of the Equal Educational Opportunity Section, Illinois State Board of Education, 188 West Randolph (Ch-6), Chicago, Illinois 60601 (telephone: 312/793-3226).

Title IV, Section 409 of the Education Amendments of 1974, Special Projects Act, P.L. 93-380 -- Special Arts. This program provides maintenance of a State Arts Advisory Committee and its affiliate Regional Arts Advisory committees. Local educational agencies may request technical assistance from the Illinois State Board of Education and selected required arts consultants. For further information, contact Dr. Lynn Wharton, Program Planning and Development Department, Illinois State Board of Education, 100 North First Street, Springfield, Illinois, 62777 (telephone: 217/782-2826).

Summary of Federal Funding for Programs and Administration

<u>Program</u>	<u>FY 83 Program Funds</u>	<u>FY 83 Administration Funds</u>
Education Consolidation and Improvement Act, Chapter 1, P.L. 97-35	<u>\$263,986,800</u>	<u>\$10,081,870</u>
P.L. 89-313, and		
Neglected and Delinquent Migrants	150,000,000	1,947,700
Title IV, Part B - Library Resources	2,000,000	160,000
Title IV, Part C - Educational Innovation	8,000,000	165,000
Title V, State Agency Community Education Teacher Centers	3,127,700	165,000
Law-Based Education		350,000
Title II, Basic Skills	50,000	26,700
Equal Educational Opportunities - Title IV, Sex Equity		265,140
Equal Educational Opportunities - Title IV, Race		300,230
Title IV, Part B, Bilingual Education		330,000
Title VII, Bilingual Deaf-Blind	400,000	129,400
Title IX, Gifted - Project Engage	10,000	40,400
Title VI, Part D - Education Fellowship		156,000
Special Education, P.L. 94-142	55,000,000	2,769,800
Adult Education	5,300,000	297,800
C.E.T.A.	8,300,000	391,300
Vocational	30,599,100	2,517,700
Nutrition Education	200,000	29,700
Transition for Refugee Children		40,000
Refugee Act of 1980 - P.L. 96-212	1,000,000	
School Food Service	<u>134,500,000</u>	<u>1,972,500</u>
Education Consolidation and Improvement Act	<u>21,500,000</u>	<u>4,234,800</u>
National Center for Education Statistics		75,900
Common Core Data Survey		66,300
Planning, Research, and Evaluation		9,600
National Institute of Education		7,100
Mott Foundation		<u>15,000</u>
Forest Preserves and Oil	<u>25,000</u>	
Federal Impact Aid (P.L. 815 and P.L. 874)	<u>4,875,100</u>	
TOTAL	<u>\$424,886,900</u>	<u>\$16,387,170</u>

Notes

- ¹ The School Code of Illinois. Article X, Section 20.
(1981), pp. 51-54.
- ² The School Code of Illinois, p. 51.
- ³ Becoming a Better School Board Member, (Washington D.C.:
National School Boards Association, 1982), p. 64.
- ⁴ William G. Alberts, The Effective School Board Member,
(Springfield, Illinois: Illinois Association of School Boards,
1981), p. 6.
- ⁵ Becoming a Better School Board Member, p. 8-9.
- ⁶ Alberts, p. 6.
- ⁷ Becoming a Better School Board Member, p. 15-16.
- ⁸ H. Michael Finkle, "A Board President Lists Some Priorities,"
Illinois School Board Journal, 45(1977), 8-9.
- ⁹ State, Local, and Federal Financing For Illinois Public
Schools 1982-1983 (Springfield, Illinois: Illinois State Board
of Education, 1982), p. 3.
- ¹⁰ State, Local and Federal Financing, p. 65.
- ¹¹ State, Local, and Federal Financing, p. 9.
- ¹² State, Local, and Federal Financing, p. 10.

¹³ Becoming a Better School Board Member, pp. 177-178.

¹⁴ Illinois State Board of Education. Teacher Service Record Form 87-05. (Springfield, Illinois: Illinois State Board of Education, 1982).

¹⁵ Becoming a Better School Board Member, pp. 132-134.

¹⁶ Thomas A. Smith, "How To Evaluate Your Superintendent," Illinois School Board Journal, 44(1976), 53-56.

¹⁷ Illinois State Board Of Education. Teacher/Board Collective Bargaining Information System (Springfield, Illinois: Illinois State Board Of Education, 1982), p. 2.

¹⁸ Alberts, p. 22.

¹⁹ Becoming a Better School Board Member, pp. 166-167.

²⁰ Becoming a Better School Board Member, p. 168.

²¹ State, Local, and Federal Financing, pp. 38-52.

²² Illinois Association of School Boards News Service, "Understanding Illinois School Finance," Illinois School Board Journal, 50(1982), 11-15, 26.

²³ "Understanding Illinois School Finance," p. 14.

²⁴ Becoming a Better School Board Member, pp. XI-XII.

²⁵ "Understanding Illinois School Finance," p. 12.

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