

The Guide to Effective Utah School Boards



Foreword

School board members are elected to represent the community and advocate for all public education students. This guide, produced by the Utah School Boards Association, is based on best practice and research, and is designed for Local School Boards to use as a common framework of excellence in school board governance, planning and carrying out effective school board meetings.

State laws that govern the meetings of public bodies are constantly amended by the legislature and subject to frequent interpretation by the courts. Therefore, for information regarding these laws, please rely on your local attorney or on publications that are frequently updated such as ["Convening Meetings Which Are Open to the Public"](#), updated by Burbidge, Van Komen, Tanner & Scruggs.

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Updated and Approved by USBA Board of Directors Friday August 8, 2025

USBA Mission: Building Better Boards

USBA Vision: The Utah School Boards Association shall provide leadership training, member services, and advocacy for effective school board governance.

Belief Statements:

1. Public education provides opportunities for all children.
2. Public education's success depends on public support.
3. A sustained financial commitment is essential to public education.
4. Locally elected nonpartisan school boards best represent local education needs.
5. Effective local school boards influence student achievement when collaborating with parents, students, and the education community.
6. Multiple land use provides funding for public education.
7. School trust lands must be managed for the benefit of all Utah students in perpetuity.
8. Legislation should support excellence in public education.

<https://usba.cc/wp-content/uploads/2023/09/strategic-plan-new-2023.-copy.pdf>

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1. Roles and Responsibilities

1.1 Board Members' Responsibilities

Utah Code §53G-4-402 outlines the authority and duties of an elected local school board.

- Appoint and regularly evaluate the superintendent. 53G-4-301
- Appoint and regularly evaluate the business administrator. 53G-4-302
- Establishes the District vision, goals, and priorities.
- Develops, adopts, and revises policies for District and Board operation as required by law and as determined by the Board.
- Approves a balanced budget that supports District vision and goals, approving all expenditures.
- Sets the general direction and expectations of the School District.
- Determines employee compensation and makes ultimate decisions on hiring and termination.
- Oversees implementation of the District plan, including establishment and operation of schools and adoption of school curriculum.
- Ensures accountability and sets clear expectations for administration and staff.
- Reports as required by law to the Utah State Board of Education and communicates as required with parents.

To fulfill his or her responsibilities to the students and taxpayers, each school board member must work for the welfare of all the children in the district and base decisions on what is best for the entire community. The law emphasizes that each school board is a "body corporate, with the powers and constraints of a governmental entity." Utah Code §53G-4-401(5) also states, " ... an elected member of a local school board serves and represents the residents of the local school board member's district, and that service and representation may not be restricted or impaired by the local school board member's membership on, or obligations to, the local school board."

The primary day-to-day responsibility of each board member is to be prepared. This means studying every agenda and its supporting documents. Any questions or need for more information should be referred to the superintendent or board president before a meeting. Avoid surprises, especially in a public meeting. If a board member has received a complaint or is dissatisfied with the agenda, he or she should call the superintendent before the meeting and try to resolve the problem. Raising issues with the superintendent or board president ahead of the meeting allows them time to

develop thoughtful answers that might not be possible without time to gather information.

School board members sometimes request more information before voting on a challenging issue or additional time to study the matter. Board members must feel reasonably comfortable with their votes.

Some other essential responsibilities for the individual board member include:

- Know and follow board policies that govern meeting procedures.
- Keep an open mind in board deliberations.
- Don't be afraid to ask questions when you don't understand or to ask, "why?" when you don't know the reason for something.
- Be prepared to compromise where possible to reach a decision the entire board can support.
- Represent the board with integrity, dignity, and ethical conduct at all times.
- Be mindful of your body language, facial expressions, and digital distractions during public meetings.
- Respect the confidentiality of privileged information that is made available in closed meetings or written material from the superintendent. Leaking information to favored friends or family members violates the trust of both the board and the individuals whose reputations might be harmed. Leaked information may also lead to a Class B misdemeanor in the state of Utah.

1.1.1 Board Member Professional Development

Board members are responsible for improving their skills through continuing professional development. This list includes many of the opportunities for professional development that are available.

- [USBA New Board Member Institute](#)
- [USBA Master Boards Certification](#)
- [USBA Annual Conference](#)
- [USBA Leadership Academy](#)
- [NSBA Annual Conference](#)
- USBA Board Presidents and Vice Presidents Workshop
- [Utah State Auditor Training for School Board Members](#)
- [USB E School Trustlands Training](#)
- [USBA Open Meeting Handbook](#)
- [USBA Board Member Suggested Readings](#)

1.2 The Board President's Responsibilities

The president is, first and foremost, a member of the board and therefore, is expected to participate in discussions and to vote on all motions and as any other member.

- **Plan board meeting agendas:** With the assistance of the vice president, superintendent, and business administrator plan effective board meeting agendas.
- **Lead board meetings:** Conduct meetings, following proper procedures and setting a positive tone.
- **Appoint all committees:** The board president coordinates with board members to determine committee assignments.
- **Sign all warrants:** The board president signs “all warrants ordered by the board to be drawn upon the business administrator for school money.” (Utah Code §53G-4-205(1)).
- **Spokesperson:** Serve as the board's official spokesperson to the media.
- **Include vice president:** Involving the vice president adds continuity to board meetings and other leadership responsibilities. The vice president can also be a good sounding board and support for the president.

The president plays a crucial role in the successful operation of a board of education meeting. He or she sets the tone for the meeting through fair, reasonable, and impartial treatment of all members. It is critical for the board president to remain calm and keep the meeting under control which may be difficult when board meetings deal with highly controversial issues, a discussion of a routine matter suddenly becomes charged with emotion, or when an angry speaker makes derogatory remarks about the board or superintendent.

1.2.1 Presidential effectiveness

Because emotions are contagious, it is crucial for the board president to display a positive and enthusiastic attitude during board meetings. A lackluster or indifferent chair can hinder the productivity of the board. The president should prioritize setting aside personal feelings and maintain a consistent attitude that provides stability. As a presiding officer, the president is a facilitator who guides the meeting and fosters an environment for decision-making. It is important for the president not to dominate the meeting, but rather provide each member a reasonable opportunity to speak, debate, or challenge the rulings of the chair. A president should not take offense to a challenge and should address it using parliamentary procedure. To meet these expectations, the president must be well informed about each agenda item.

During the meeting, the president should establish a business-like tone by adhering to the agenda and the time allocation for each item. The meeting should begin on time, proceed efficiently, and adjourn at a reasonable hour. The president must take charge of the meeting, ensuring that the discussion stays on topic, and managing the length of individual comments.

Discourage private conversations and digressions among board members. When the discussion on an agenda item exceeds a reasonable time or the time allocated (if used), the president should consider deferring a decision until further research can be conducted.

The school board should have written policies for conducting board meetings, and the board president should follow them. Policies and procedures pertaining to school board meetings should be reviewed regularly and revised as needed. While the president is expected to vote on all matters that come before the board, some restraint is necessary to maintain the impartiality demanded of a chair.

1.2.2 Selecting a president

The quality of leadership should determine the board's president and how long he or she should serve. There should be no assurance that any individual will be elected or reelected, but a school board with a good president should keep him or her as long as the majority of the board agrees.

School boards should not “play musical chairs” with the board presidency. The practice of taking turns or using longevity to determine the board's presidency indicates a lack of respect for leadership. The board should seek a president who has the knowledge, skills, time and desire to do the job well. The term of office for a board president is two years.

Among the characteristics to look for in a good president:

- The president should be able to subordinate personal views and represent those of the collective board.
- The president should possess the skills necessary to preside over a meeting. This would include a basic knowledge of both parliamentary procedures and the laws regulating board meetings.
- The president must understand and respect the roles of the board and superintendent as defined in board policy.

- The president must be a person who avoids playing one member or group against another. At times it may be tempting to do so to pursue a particular goal. On certain issues, they need to be someone to unite the board after making hard decisions with strong feelings.
- The president must be a leader. The president personifies the board. If the president is good, the board will be viewed as good. If the president is weak or ineffective, the public will view the board in that light.
- If conditions are right, the board president can capitalize on the visibility of the office to be a very effective cheerleader for the district, and especially for the superintendent and staff.
- The president must be adept at communicating with the news media. Because the majority of the public does not attend school board meetings, most people rely on news media coverage of school board meetings for their information. The extent and quality of that coverage can be significantly improved by the president who properly, openly, candidly, and honestly deals with the media.

1.3 The Vice President

The School Board is also required to elect a vice president who performs the duties of the president in the event of a vacancy or if the president is unavailable to act. A board is well advised to select a vice president who has many of the same skills and qualities of the president. The term of office for both the president and vice president is two years.

- Assist the president as requested.
- Participate in the process of creating meeting agendas.
- Be ready to fill in for the president in meetings and other responsibilities.

1.4 Superintendent's Responsibilities

The law requires each local school board to "appoint a district superintendent" Utah Code [§53G-4-301](#) requires each local school board to "appoint a district superintendent of schools who serves as the board's chief executive officer." The superintendent's term of office is two years.

A school district superintendent is responsible for the overall management and direction of the district's educational programs, operations, and staff. They work under the direction of the school board and are responsible for implementing policies and ensuring the district meets its educational goals.

- **Leadership and Vision:** Superintendents provide visionary leadership and strategic direction to the district, working with the school board to set goals and objectives for educational improvement.
- **Relationship with the School Board:** They promote friendly and harmonious relationships with the board, apprise the board of areas of concern or potential problems in the district as they arise, and provide counsel on educational, legal, management, and political issues.
- **Policy Implementation:** They are responsible for implementing policies set by the school board and ensuring compliance with local, state, and federal regulations.
- **District Operations:** Superintendents oversee the day-to-day operations of the school district, including managing budgets, hiring personnel (like principals and assistant superintendents), and overseeing facilities.
- **Communication and Advocacy:** They serve as a liaison between the school district, the community, and various stakeholders, including parents, teachers, and policymakers.
- **Academic Standards and Accountability:** Superintendents monitor the district's adherence to academic standards and testing requirements, ensuring that students are meeting educational benchmarks.
- **Staff Supervision:** Superintendents supervise and evaluate the performance of district staff, including principals and other administrators.
- **Budget Management:** In coordination with the Business Administrator, they are responsible for developing and managing the district's budget, ensuring that resources are used effectively to support educational programs .
- **Community Engagement:** Superintendents work to build positive relationships with the community, engaging with parents, community organizations, and other stakeholders to promote the district's educational goals.

1.4.1 Superintendent Responsibilities Related to Board Meetings

Before every board meeting, the superintendent meets with the board president, vice president, and business administrator to establish the agenda, clarify any points of concern, and provide a list of people who have, to that point, asked permission to address the board and the subjects of their interests.

Prior to an upcoming meeting the superintendent should meet with top administrative staff members, distribute the completed agenda and make plans for staff to present or participate on any agenda items.

During board meetings, the superintendent's involvement depends on the nature of the agenda items and expectations of the board. The superintendent should not dominate board meetings.

1.4.2 Administrative Recommendations

When the agenda is planned, the superintendent should make a recommendation or take a position on most action items. During board meetings, members of the board discuss and vote on these recommendations. In general, boards tend to approve the recommendations made by their superintendents, assuming that the superintendent has adequately researched the issue and weighed the alternatives in light of existing board policy.

Where a recommended decision has financial implications, care must be taken to align board decisions with available district resources, such as staff, facilities, and operating funds. Steps may be needed to find the necessary resources by re-prioritizing existing programs or seeking new sources for funds.

If the board rejects all or a part of the superintendent's recommendation, the board should ask the superintendent to return to the board with a revised recommendation. When the final board decision is made, the superintendent is obligated to support and implement the board's decision.

Following each meeting, the superintendent is accountable for seeing that board decisions are carried out and is delegated the authority to do so. Some decisions will require immediate implementation, others can be delayed. There may be a time lag between board action and implementation. Variables to be considered include: the board's priorities; resources available, such as the size of the administrative staff; the need for a timetable; and the scope of the assignment.

If the superintendent has adequate staff, much of the work can be delegated. In a small school district, the superintendent probably will do most of the work and will need to establish priorities. A time-table that lists tasks, dates started, and dates to be completed is useful. Deadlines must be realistic. Tasks that require several months to

complete need to be carefully scheduled and monitored. The superintendent should make progress reports to the board on how decisions made by the board are being implemented.

1.5 Business Administrator's Responsibilities

The law requires each local school board to appoint a business administrator whose term of office is also two years. Utah Code §53G-4-303 prescribes the duties of the business administrator, subject to the direction of the superintendent of schools:

- Attend all meetings of the local school board, keep an accurate record of its proceedings, and have custody of the seal and records.
- Be custodian of all district funds.
- Be responsible and accountable for all money received and disbursed.
- Keep accurate records of all revenues received and their sources.
- Countersign with the president of the local school board all warrants and claims against the district as well as other legal documents approved by the local school board.
- Prepare and submit a written monthly report of the district's receipts and expenditures to the local school board for approval.
- Use uniform budgeting, accounting, and auditing procedures and forms approved by the state board, which shall be under accordance with generally accepted accounting principles or auditing standards and Title 63J, Chapter 1, Budgetary Procedures Act.
- Prepare and submit a comprehensive annual statement to the local school board, detailing the district's revenue and expenditures for the period ending June 30. This statement should include the beginning and ending fund balances.
- Assist the superintendent in the preparation and submission of budget documents and statistical and fiscal reports required by law and the Utah State School Board.
- Ensure that adequate internal controls are in place to safeguard the district's funds.
- Perform other duties as the superintendent may require.

Additionally, the Business Administrator works with the Board President, Vice President, and Superintendent to prepare meeting agendas.

1.6 Monitoring Administrative Performance

The school board relies on the superintendent and business administrator for leadership and action. The school board is the "governing body", while the superintendent and the business administrator carry out the day-to-day work of the district. This means the board must place a good deal of trust in the superintendent and business administrator. Still, a school board also must be satisfied that the superintendent and business administrator are managing the district within board policies.

Here are some questions that each school board should consider:

- Does the board receive effective leadership from the superintendent/business administrator in the form of information, advice, and recommendations on board actions?
- Is the board adequately informed about the district's problems, progress, accomplishments, and needs?
- Do the board and superintendent/business administrator understand and support one another?
- Have the superintendent/business administrator established effective systems to promote best practices at all levels in the district?
- Does the superintendent/business administrator assist the board with making policy decisions?
- Do the board members and the superintendent/business administrator have a shared vision for the district?
- Does the superintendent/business administrator regularly evaluate the programs and operations of the school district?
- Does the superintendent/business administrator participate in regular professional development?
- Is the work of the superintendent/business administrator satisfactory? Is the feeling based on fact, informed opinion, or blind faith?

The board can use these questions to evaluate the relationship between the board and the superintendent/business administrator and make adjustments accordingly. An efficient monitoring and evaluation system offers advantages to both the board and the superintendent/superintendent as it necessitates their collaboration to clearly define their individual roles and duties, and establish a mutual understanding on how the execution of those responsibilities will be assessed.

It is required and expected that school board, superintendent and business administrator evaluations be completed annually, but it is at the discretion of the board how these evaluations occur. As a service to local school districts, the Utah School Boards Association (USBA) has developed effective evaluation tools for the school board, superintendent and the business administrator. These tools are available at the request of the board president and can be adapted to meet the individual needs of a school board.

1.7 The School Board Attorney

Most school boards rely heavily on having immediate access to legal counsel, as the role of a school administrator is increasingly filled with numerous legal challenges and risks.

While it is not necessary for most boards to have an attorney present at all meetings, some may choose to do so. Matters needing legal analysis are typically referred to counsel through the superintendent, or the attorney is asked to be present whenever a particular matter deems it necessary. In any event, each school board should have a policy that sets forth how it will fill its needs for legal assistance. Board members need to know how they will select and work with an attorney.

2. Board Management

An effective set of board policies and committees can build confidence in the board and allow for business to be transacted efficiently.

2.1 Establishing Regular Meetings

Boards must schedule regular meetings annually and publish the calendar in advance. Boards should solicit staff and community input and include policy review/compliance on their annual agenda. New members must have access to the policy manual and understand procedures for influencing board operations.

2.2 Adoption of Policies

Board policy development and adoption is the primary responsibility of the school board. Every board should have a process for keeping all policies current. This process should include the opportunity for staff and community input. The board's annual agenda should include schedules for both reviewing policy appropriateness and monitoring policy compliance.

2.3 Board Structure and Committees

Some school boards create standing committees made up of staff and citizens who are not members of the board. State law requires some committees of this type, including school traffic safety committees.(Utah Code §53G-A-17,18)

Committees may advise or recommend but cannot make binding decisions. Certain standing committees are statutorily required.

2.3.1 Special or ad hoc committees

Special Committees formed for a defined purpose and duration; they report to the full board and then disband

2.3.2 Citizens' advisory committees

These advisory committees gather input; remain advisory only—final decisions require a properly convened board meeting.

2.4 New Member Orientation

School Boards must support new members with training on governance, finance, law, and local procedures. Orientation materials—policies, past minutes, financials—should be provided, and workshops or refresher courses offered.

New board members must work hard to acquire the factual knowledge, conceptual understanding, and interpersonal skills to do the job well. In addition to individual effort, finding a place on the board calls for teamwork. Many school boards adopt policies for getting the new member(s) "on board" as rapidly as possible. Workshops sponsored by school boards associations or other agencies can help the inexperienced board member become familiar with school board governance, school finance, school law, and other broadly applicable matters. Much of the knowledge a board member needs, however, is available only at the local level in the form of policies, financial statements, minutes of past meetings, administrative procedures, and the like.

2.5 Filling Vacancies

Vacancies must be filled within 30 days (45 if by death), with two-week public notice. If 14 days before the next filing deadline and if greater than 2 years remain, the appointee serves only until the next election. Appointees must reside in the same precinct (Utah Code § 20A-1-511).

3. Reorganizing the School Board

After each even-year election, boards reorganize by electing officers. The retiring president may serve as temporary chair until a new president and vice president are elected.

3.1 Oath of Office

At the first January meeting, new members recite the constitutional oath (Utah Code § 20A-14-203; Utah Const. Art. IV, § 10).

"A member of a local board of education is 'qualified' when the member takes or signs the constitutional oath of office" (Utah Code §20A-14-203).

Each board member, following their election, at the or after being appointed recites the following oath: "I do solemnly swear (or affirm) that I will support, obey and defend the Constitution of the United States and the Constitution of the State of Utah, and that I will discharge the duties of my office with fidelity" (Constitution of Utah Article IV, Section 10).

3.2 Election of officers (Utah Code §53G-4-203)

Officers (president and vice president) serve two-year terms, elected by open vote at the first January meeting. Nominations need not be seconded. If only one is nominated, the business administrator casts a unanimous ballot. A president pro tem chairs until a president is chosen; then that president chairs the election of vice president. The vice president serves as pro tem if the president is unavailable. If both officers are absent, any board member may be appointed pro tem

3.3 Nominations and Voting

Nominations need not be seconded, but may be, to show support for the candidate. If only one member is nominated, the business administrator is instructed to cast a unanimous ballot for that member, who is there upon declared elected.

If two or more members are nominated, the election for president and vice president must be by an open vote and not by any form of secret ballot. There is no provision in the law for a secret vote, and the declared public policy of the

state, as expressed in the Open and Public Meetings Act, is that actions of public bodies be taken openly.

Typically the candidate with the lowest number of votes is eliminated for the next round of voting. Voting continues until one candidate receives a majority of the votes cast.

The newly elected president then takes over the duties of the chair, and the board proceeds to elect a vice president in the same manner it elected its president. The vice president, who also must be a member of the board, performs the duties of the president when the presidency is vacant or when the president is absent or unable to perform them.

Both the president and the vice president play key roles in the effective functioning of the school board. Individuals selected for these key positions should be fully aware of the responsibilities involved and possess the requisite skills.

4. Why is it important to hold an effective school board meeting?

Effective school board meetings are crucial for several reasons:

1. **Decision Making** School board meetings are where important decisions are made regarding policies, budget allocations, curriculum changes, personnel matters, and other critical aspects that impact the district and its stakeholders. Effective meetings ensure that decisions are well-informed, transparent, and beneficial to the school district community.
2. **Accountability and Oversight** Board meetings provide a platform for overseeing the district's operations, ensuring that policies and procedures are followed, and resources are allocated appropriately. Effective meetings facilitate discussions that hold administrators accountable for their actions and decisions.
3. **Community Engagement and Transparency** These meetings ensure opportunities for community members, parents, teachers, and other stakeholders to engage with the school board, express concerns, offer suggestions, and gain insight into the decision-making processes. Transparency in meetings fosters trust and confidence in the board's leadership.
4. **Strategic Planning and Vision Setting** School board meetings often involve discussions about the school's long-term goals, vision, and strategic direction. Effective meetings enable meaningful conversations that shape the district's future and ensure alignment with its mission.
5. **Efficiency and Productivity** Well-run meetings with clear agendas and effective facilitation techniques, like Robert's Rules of Order, result in productive discussions, efficient use of time, and better outcomes, keeping the focus on important matters.
6. **Legal and Compliance Requirements** School boards have legal responsibilities and compliance requirements. Effective meetings ensure that these obligations are met, records are maintained accurately, and necessary procedures are followed, reducing the risk of legal issues.

7. **Continuous Improvement** By evaluating meeting effectiveness and seeking feedback, school boards can continuously improve their processes, communication, and decision-making, leading to better outcomes for the district and its stakeholders.

5. How to create an effective agenda for a school board meeting?

The responsibility for shaping the content of board meetings' agendas falls on the board president. Working in consultation with the president, the superintendent is tasked with preparing the agendas.

School board members can submit items to the superintendent or president for potential inclusion on the agenda. If a topic arises during a meeting from a member of the public that isn't on the agenda, the board may discuss it at the discretion of the president, but no final action can be taken (Utah Code [§52-4-202\(6\)\(b\)](#)).

Ahead of each meeting (except in emergency situations), the superintendent must provide each school board member with a copy of the agenda, containing sufficient data and background information.

The Board President has the authority to determine the order of business at regular school board meetings. However, with the consent of the majority of present members, the order of business can be altered at any meeting.

Creating an effective agenda for a school board meeting involves careful planning and consideration of key topics that require discussion or decision-making. Here are steps to create a comprehensive agenda:

Identify Priority Topics:

1. Review ongoing initiatives, pending decisions, upcoming events, budget updates, policy changes, personnel matters, and any pressing issues relevant to the school's governance.
2. Consider input from board members, school administrators, staff, and stakeholders regarding agenda items.

Organize Agenda Items:

1. Prioritize agenda items based on urgency, importance, and relevance to the school's mission and objectives.
2. Group related topics together to streamline discussions and decision-making.

Time Allocation:

1. Estimate the time needed for each agenda item realistically. Allocate more time for complex or critical topics and shorter durations for routine matters.
2. Agenda should allow for adequate discussion without overrunning the meeting schedule.

Include Standard Agenda Sections:

- a. Start with standard items such as approval of previous meeting minutes, reports from school administrators, financial updates, and new business.
- b. Include time for public comment or input if it's a regular part of the board meeting.

Distribute Meeting Materials:

1. Gather relevant documents, reports, presentations, or proposals related to each agenda item.
2. Distribute these materials to board members in advance, allowing sufficient time for review and preparation.

Consult with Key Stakeholders:

Reach out to school administrators, staff, parent-teacher organizations, or community representatives to gather input on agenda items that may affect them directly.

Review and Finalize:

1. Share the draft agenda with board members for feedback and input. Consider any necessary revisions based on their suggestions.
2. Ensure the final agenda is structured logically and clearly outlines the sequence of topics to be discussed.

Communicate the Agenda:

1. Circulate the final agenda to all board members and relevant stakeholders well in advance of the meeting date.
2. Following legal guidelines, notify all board members and stakeholders of the meeting date, time, and agenda following well in advance to allow for scheduling and preparation.

3. Emphasize the meeting's objectives, expectations, and any specific actions required from attendees.

Flexibility and Adaptability: Remain open to adjustments or additions to the agenda if urgent matters arise before the meeting. Include provisions for addressing unforeseen issues during the meeting if necessary.

Review Meeting Effectiveness:

After the meeting, assess the effectiveness of the agenda by gathering feedback from board members and stakeholders. Use this feedback to improve future agendas and meetings. Creating an effective agenda involves a balance between addressing essential matters, allowing for meaningful discussions, and respecting the time of all participants. A well-structured agenda sets the tone for productive school board meetings and ensures that crucial matters are addressed efficiently.

5.1 Example Agenda (from [Alpine School District](#))

ORDER OF MEETING PROCEDURE

1. Call to Order
2. Pledge of Allegiance
3. Inspirational Thought or Reflection
4. Recognitions
5. Community Comments
6. Approval of Minutes
7. Claims
8. Routine Business - May include but is not limited to:
 - a. Budget Summary
 - b. Alpine Foundation Board Summary
 - c. Personnel Hiring and Releases
 - d. LEA Specific Licenses
 - e. Student Trip Request
9. Action Items
10. Discussion/Action Items
11. Discussion Items
12. Board Member and Superintendent Reports and Information Items
13. Adjournment or Roll Call for Closed Session as needed to discuss

- a. Personnel,
- b. Property,
- c. Litigation, and
- d. Collective Bargaining

5.2 Consent Agenda

A consent agenda is a practice used in meetings, including school board meetings, to streamline the approval process for routine or non-controversial items. It's a way to group together various items that are typically considered routine or administrative in nature and that are expected to be approved without any extensive discussion or debate.

In a school board meeting, the consent agenda often includes items such as:

1. Meeting minutes from previous meetings.
2. Routine financial reports or budgetary items.
3. Personnel actions (such as hiring or resignations) for positions that don't require extensive discussion.
4. Routine contracts, agreements, or purchases that are within the board's pre-approved limits.
5. Other non-controversial matters that the board expects will meet unanimous or near-unanimous approval.

During the meeting, the chair or the board secretary will present the consent agenda to the board members. They'll ask if any member wishes to pull an item from the consent agenda for individual discussion and vote. If no board member requests to pull any items, the entire consent agenda is usually approved with a single vote.

This process helps save time during meetings, allowing the board to focus on more significant or contentious issues while efficiently handling routine matters. However, if any board member feels an item on the consent agenda requires discussion or further consideration, they have the opportunity to request its removal for separate deliberation and vote.

The specific items included in a consent agenda may vary from one school board meeting to another based on the agenda and the needs of the district.

5.3 Creating Engaging School Board Meetings

Making a school board meeting interesting involves various strategies to engage participants, promote meaningful discussions, and ensure the meeting serves its purpose effectively. Here are some ways to make a school board meeting more engaging and productive:

- **Interactive Agenda Design:** Structure the agenda to include interactive components, such as engaging presentations, discussions on relevant and pressing issues, and opportunities for collaborative problem-solving.
- **Highlight Student Achievements:** Dedicate a portion of the meeting to showcase student achievements, performances, or presentations, providing a direct connection to the school community's successes and talents. It's recommended to highlight student achievements before public comment to set a positive tone to the meeting.
- **Celebrate Milestones or Achievements:** Acknowledge and celebrate important milestones, successes, or accomplishments within the school district or among board members.
- **Public Participation and Involvement:** Allocate time for public comments, allowing community members, parents, and students to share their perspectives, concerns, or ideas with the board. Set a time limit for each public comment.
- **Time Management and Efficiency:** Strive to keep the meeting focused and efficient by managing time effectively, avoiding unnecessary delays, and ensuring discussions remain on track.
- **Focused Presentations:** Invite experts, educators, or community leaders to offer insights or expertise on relevant educational issues.
- **Professional Development:** Regularly include topics relevant to the board's responsibilities, fostering continuous learning and professional development among members.
- **Evaluate and Adjust:** Regularly seek feedback from board members and stakeholders to evaluate the effectiveness of meetings and make adjustments based on suggestions for improvement.

By incorporating these strategies, a school board meeting can become more engaging, informative, and inclusive, fostering a collaborative environment that benefits the entire school community.

6. How do I hold an effective school board meeting?

To conduct an effective school board meeting, consider the following steps and strategies:

6.1 Facilitation during the Meeting

1. Punctuality: Start the meeting on time to respect the schedules of attendees.
2. Introduction: Begin with a brief introduction, outlining the agenda and any protocols for the meeting.
3. Engage Participants: Encourage active participation and discussion among board members while ensuring everyone has the opportunity to express their viewpoints.
 - a. Manage Discussions: Keep discussions focused on the agenda items. Encourage constructive dialogue and ensure that all perspectives are heard.
 - b. Decision Making: Guide the board through decision-making processes, ensuring clarity on actions to be taken and assigning responsibilities as needed.
 - c. Note-taking: Designate someone to take accurate meeting minutes, recording key decisions, action items, and assigned tasks.

6.2 Maintain Order and Respect

1. Meeting Etiquette: Establish and enforce meeting etiquette to ensure respectful communication and interaction among attendees.
2. Conflict Resolution: If conflicts arise, address them calmly and professionally. Redirect the conversation back to the agenda items and meeting objectives.

6.3 Voting Details

Voting during a school board meeting involves following established procedures to make decisions on various agenda items. Here's a guide on how a school board typically conducts voting:

- **Call for a Motion:** When an agenda item requires a decision or action, the board president calls for a motion. A board member usually makes a motion to address the issue. The motion must be clear and specific about what action is proposed.
- **Second the Motion:** Another board member must second the motion to indicate support for discussing the proposal. If no one seconds the motion, it typically dies without further discussion.
- **Discussion:** After the motion is seconded, the board president asks if there is any discussion to the motion. The board engages in discussion on the proposed action. Board members can ask questions, express their viewpoints, and share opinions or concerns related to the motion.
- **Voting Procedure:**
 - The board president or chairperson calls for the vote by asking for all those who are in favor of the motion and then asking for those who are opposed.
 - Although Utah does not require a roll call vote for most decisions, a roll call vote is required to move into closed session. During a roll call vote, each board member responds individually, stating "yes," "no," or "abstain" when their name is called.
- **Counting the Votes:** The presiding officer or the business administrator tallies the votes to determine the outcome. The majority vote typically decides the action, but certain decisions might require a specific majority (e.g., simple majority, two-thirds majority) as specified in the bylaws or regulations.
- **Announcing the Results:** After the vote is counted, the presiding officer announces the results of the vote, specifying the number of votes for and against the motion, and whether the motion passed or failed.
- **Recording the Vote:** The minutes of the meeting should include a record of the motion, the names of board members voting for and against, and the outcome of the vote for documentation purposes.
- **Resolutions and Formal Actions:** For formal resolutions or significant decisions, the board might draft and approve a written resolution or official document summarizing the action taken.
- **Maintain Confidentiality and Transparency:** Ensure that votes and discussions are conducted with transparency, adhering to confidentiality requirements when discussing sensitive or private matters.

It's crucial for school boards to follow their established rules, bylaws, or parliamentary procedures regarding voting to ensure fairness, transparency, and effective decision-making during meetings.

See **Appendix J** for more detailed parliamentary procedure.

6.4 School Board Meeting Security

Security measures for a school board meeting are essential to ensure the safety of attendees, maintain order, and prevent potential disruptions. Here are some effective security measures to consider.

Crowd Management:

- Arrange seating to ensure clear aisles and walkways for easy movement and to prevent overcrowding.
- Clearly communicate meeting rules and expectations to attendees to maintain order and minimize disruptions.

Communication and Coordination:

- Establish clear communication channels among security personnel, staff, and law enforcement to facilitate prompt responses to any security incidents or concerns.

Emergency Response Plan:

- Develop and communicate an emergency response plan that outlines procedures for different scenarios, such as disruptions, protests, medical emergencies, or security threats.

Security Staff Presence:

- The presence of trained security personnel or law enforcement officers may be needed to respond to any security concerns swiftly.

Regular Security Assessments and Updates:

- Conduct regular security assessments of meeting venues and procedures, making necessary updates and improvements based on identified vulnerabilities or changing security needs.

Implementing comprehensive security measures for school board meetings helps create a safe and secure environment for all attendees and contributes to the smooth conduct of meetings.

6.5 Adaptability and Flexibility

As unforeseen circumstances or urgent matters might require adjustments to the agenda or meeting dynamics. By implementing these strategies, you can facilitate productive and efficient school board meetings that contribute to student success.

6.6 Follow-up Actions

1. **Summary of Decisions:** At the meeting's conclusion, summarize key decisions, action points, and responsibilities to ensure clarity and consensus.
2. **Assign Tasks:** Clearly assign follow-up tasks to specific individuals, outlining deadlines and expectations.
3. **Progress Review:** Regularly review and track the progress of action items in subsequent meetings to ensure accountability.

7. How should a school board president and vice president plan a school board meeting?

Planning a school board meeting involves several crucial steps to ensure the meeting runs smoothly, covers essential topics, and fosters productive discussions among board members.

- **Set the Agenda:** Collaborate with the superintendent, board members, and relevant stakeholders to create a comprehensive agenda. Include items such as approval of minutes, reports from committees, presentations, student and staff recognitions, discussion topics, action items, and any new business. Ensure presenters are briefed on the allotted time and key points to cover.
- **Distribute the Agenda and all necessary supporting materials in Advance:** Work with the Superintendent and staff to share the agenda and supporting materials with board members and key participants well in advance of the meeting.
- **Establish Meeting Protocols:** Set clear meeting protocols, including rules for discussions, time limits for agenda items, procedures for public comments, and guidelines for decision-making.
- **Review Legal and Procedural Requirements:** Familiarize yourself with legal requirements, bylaws, and parliamentary procedures governing the board meeting. Ensure compliance with Open Meeting laws and other relevant regulations.
- **Facilitate Pre-Meeting Discussions:** Engage in discussions with the superintendent, committee chairs, and board members before the meeting to address any concerns, clarify agenda items, and gather input.
- **Manage Meeting Logistics:** Arrange the logistics for the meeting, including the meeting room setup, audio-visual equipment, seating arrangements, and any other necessary arrangements.

A well-planned school board meeting can contribute significantly to the governance and success of the school district. Communication, preparation, and adherence to established procedures are key responsibilities of the school board president in planning such meetings.

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7.2. Creating Engaging School Board Meetings

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By incorporating these strategies, a school board meeting can become more engaging, informative, and inclusive, fostering a collaborative environment that benefits the entire school community.

8. Roles and Responsibilities

8.1 Board Members' Responsibilities

Utah Code §53G-4-402 outlines the authority and duties of an elected local school board.

- Appoint and regularly evaluate the superintendent. 53G-4-301

- Appoint and regularly evaluate the business administrator. 53G-4-302
- Establishes the District vision, goals, and priorities.
- Develops, adopts, and revises policies for District and Board operation as required by law and as determined by the Board.
- Approves a balanced budget that supports District vision and goals, approving all expenditures.
- Sets the general direction and expectations of the School District.
- Determines employee compensation and makes ultimate decisions on hiring and termination.
- Oversees implementation of the District plan, including establishment and operation of schools and adoption of school curriculum.
- Ensures accountability and sets clear expectations for administration and staff.
- Reports as required by law to the Utah State Board of Education and communicates as required with parents.

To fulfill his or her responsibilities to the students and taxpayers, each school board member must work for the welfare of all the children in the district and base decisions on what is best for the entire community. The law emphasizes that each school board is a "body corporate, with the powers and constraints of a governmental entity." Utah Code §53G-4-401(5) also states, " ... an elected member of a local school board serves and represents the residents of the local school board member's district, and that service and representation may not be restricted or impaired by the local school board member's membership on, or obligations to, the local school board."

The primary day-to-day responsibility of each board member is to be prepared. This means studying every agenda and its supporting documents. Any questions or need for more information should be referred to the superintendent or board president before a meeting. Avoid surprises, especially in a public meeting. If a board member has received a complaint or is dissatisfied with the agenda, he or she should call the superintendent before the meeting and try to resolve the problem. Raising issues with the superintendent or board president ahead of the meeting allows them time to develop thoughtful answers that might not be possible without time to gather information.

School board members sometimes request more information before voting on a challenging issue or additional time to study the matter. Board members must feel reasonably comfortable with their votes.

Some other essential responsibilities for the individual board member include:

- Know and follow board policies that govern meeting procedures.
- Keep an open mind in board deliberations.
- Don't be afraid to ask questions when you don't understand or to ask, "why?" when you don't know the reason for something.
- Be prepared to compromise where possible to reach a decision the entire board can support.
- Represent the board with integrity, dignity, and ethical conduct at all times.
- Be mindful of your body language, facial expressions, and digital distractions during public meetings.
- Respect the confidentiality of privileged information that is made available in closed meetings or written material from the superintendent. Leaking information to favored friends or family members violates the trust of both the board and the individuals whose reputations might be harmed. Leaked information may also lead to a Class B misdemeanor in the state of Utah.

8.2 The Board President's Responsibilities

The president is, first and foremost, a member of the board and therefore, is expected to participate in discussions and to vote on all motions and as any other member.

- **Plan board meeting agendas:** With the assistance of the vice president, superintendent, and business administrator plan effective board meeting agendas.
- **Lead board meetings:** Conduct meetings, following proper procedures and setting a positive tone.
- **Appoint all committees:** The board president coordinates with board members to determine committee assignments.
- **Sign all warrants:** The board president signs "all warrants ordered by the board to be drawn upon the business administrator for school money." (Utah Code §53G-4-205(1)).
- **Spokesperson:** Serve as the board's official spokesperson to the media.
- **Include vice president:** Involving the vice president adds continuity to board meetings and other leadership responsibilities. The vice president can also be a good sounding board and support for the president.

The president plays a crucial role in the successful operation of a board of education meeting. He or she sets the tone for the meeting through fair, reasonable, and impartial treatment of all members. It is critical for the board president to remain calm and keep

the meeting under control which may be difficult when board meetings deal with highly controversial issues, a discussion of a routine matter suddenly becomes charged with emotion, or when an angry speaker makes derogatory remarks about the board or superintendent.

8.2.1 Presidential effectiveness

Because emotions are contagious, it is crucial for the board president to display a positive and enthusiastic attitude during board meetings. A lackluster or indifferent chair can hinder the productivity of the board. The president should prioritize setting aside personal feelings and maintain a consistent attitude that provides stability. As a presiding officer, the president is a facilitator who guides the meeting and fosters an environment for decision-making. It is important for the president not to dominate the meeting, but rather provide each member a reasonable opportunity to speak, debate, or challenge the rulings of the chair. A president should not take offense to a challenge and should address it using parliamentary procedure. To meet these expectations, the president must be well informed about each agenda item.

During the meeting, the president should establish a business-like tone by adhering to the agenda and the time allocation for each item. The meeting should begin on time, proceed efficiently, and adjourn at a reasonable hour. The president must take charge of the meeting, ensuring that the discussion stays on topic, and managing the length of individual comments.

Discourage private conversations and digressions among board members. When the discussion on an agenda item exceeds a reasonable time or the time allocated (if used), the president should consider deferring a decision until further research can be conducted.

The school board should have written policies for conducting board meetings, and the board president should follow them. Policies and procedures pertaining to school board meetings should be reviewed regularly and revised as needed. While the president is expected to vote on all matters that come before the board, some restraint is necessary to maintain the impartiality demanded of a chair.

8.2.2 Selecting a president

The quality of leadership should determine the board's president and how long he or she should serve. There should be no assurance that any individual will be elected or reelected, but a school board with a good president should keep him or her as long as the majority of the board agrees.

School boards should not “play musical chairs” with the board presidency. The practice of taking turns or using longevity to determine the board's presidency indicates a lack of respect for leadership. The board should seek a president who has the knowledge, skills, time and desire to do the job well. The term of office for a board president is two years.

Among the characteristics to look for in a good president:

- The president should be able to subordinate personal views and represent those of the collective board.
- The president should possess the skills necessary to preside over a meeting. This would include a basic knowledge of both parliamentary procedures and the laws regulating board meetings.
- The president must understand and respect the roles of the board and superintendent as defined in board policy.
- The president must be a person who avoids playing one member or group against another. At times it may be tempting to do so to pursue a particular goal. On certain issues, they need to be someone to unite the board after making hard decisions with strong feelings.
- The president must be a leader. The president personifies the board. If the president is good, the board will be viewed as good. If the president is weak or ineffective, the public will view the board in that light.
- If conditions are right, the board president can capitalize on the visibility of the office to be a very effective cheerleader for the district, and especially for the superintendent and staff.
- The president must be adept at communicating with the news media. Because the majority of the public does not attend school board meetings, most people rely on news media coverage of school board meetings for their information. The extent and quality of that coverage can be significantly improved by the president who properly, openly, candidly, and honestly deals with the media.

8.3 The Vice President

The School Board is also required to elect a vice president who performs the duties of the president in the event of a vacancy or if the president is unavailable to act. A board is well advised to select a vice president who has many of the same skills and qualities of the president. The term of office for both the president and vice president is two years.

- Assist the president as requested.
- Participate in the process of creating meeting agendas.
- Be ready to fill in for the president in meetings and other responsibilities.

8.4 Superintendent's Responsibilities

Utah Code [§53G-4-301](#) requires each local school board to "appoint a district superintendent of schools who serves as the board's chief executive officer." The superintendent's term of office is two years.

A school district superintendent is responsible for the overall management and direction of the district's educational programs, operations, and staff. They work under the direction of the school board and are responsible for implementing policies and ensuring the district meets its educational goals.

- **Leadership and Vision:** Superintendents provide visionary leadership and strategic direction to the district, working with the school board to set goals and objectives for educational improvement.
- **Relationship with the School Board:** They promote friendly and harmonious relationships with the board, apprise the board of areas of concern or potential problems in the district as they arise, and provide counsel on educational, legal, management, and political issues.
- **Policy Implementation:** They are responsible for implementing policies set by the school board and ensuring compliance with local, state, and federal regulations.
- **District Operations:** Superintendents oversee the day-to-day operations of the school district, including managing budgets, hiring personnel (like principals and assistant superintendents), and overseeing facilities.

- **Communication and Advocacy:** They serve as a liaison between the school district, the community, and various stakeholders, including parents, teachers, and policymakers.
- **Academic Standards and Accountability:** Superintendents monitor the district's adherence to academic standards and testing requirements, ensuring that students are meeting educational benchmarks.
- **Staff Supervision:** Superintendents supervise and evaluate the performance of district staff, including principals and other administrators.
- **Budget Management:** In coordination with the Business Administrator, they are responsible for developing and managing the district's budget, ensuring that resources are used effectively to support educational programs .
- **Community Engagement:** Superintendents work to build positive relationships with the community, engaging with parents, community organizations, and other stakeholders to promote the district's educational goals.

8.4.1 Superintendent Responsibilities Related to Board Meetings

Before every board meeting, the superintendent meets with the board president, vice president, and business administrator to establish the agenda, clarify any points of concern, and provide a list of people who have, to that point, asked permission to address the board and the subjects of their interests.

Prior to an upcoming meeting the superintendent should meet with top administrative staff members, distribute the completed agenda and make plans for staff to present or participate on any agenda items.

During board meetings, the superintendent's involvement depends on the nature of the agenda items and expectations of the board. The superintendent should not dominate board meetings.

8.4.2 Administrative recommendations

When the agenda is planned, the superintendent should make a recommendation or take a position on most action items. During board meetings, members of the board discuss and vote on these recommendations. In general, boards tend to approve the recommendations made by their superintendents, assuming that the superintendent

has adequately researched the issue and weighed the alternatives in light of existing board policy.

Where a recommended decision has financial implications, care must be taken to align board decisions with available district resources, such as staff, facilities, and operating funds. Steps may be needed to find the necessary resources by re-prioritizing existing programs or seeking new sources for funds.

If the board rejects all or a part of the superintendent's recommendation, the board should ask the superintendent to return to the board with a revised recommendation. When the final board decision is made, the superintendent is obligated to support and implement the board's decision.

Following each meeting, the superintendent is accountable for seeing that board decisions are carried out and is delegated the authority to do so. Some decisions will require immediate implementation, others can be delayed. There may be a time lag between board action and implementation. Variables to be considered include: the board's priorities; resources available, such as the size of the administrative staff; the need for a timetable; and the scope of the assignment.

If the superintendent has adequate staff, much of the work can be delegated. In a small school district, the superintendent probably will do most of the work and will need to establish priorities. A time-table that lists tasks, dates started, and dates to be completed is useful. Deadlines must be realistic. Tasks that require several months to complete need to be carefully scheduled and monitored. The superintendent should make progress reports to the board on how decisions made by the board are being implemented.

8.5 Business Administrator's Responsibilities

The law requires each local school board to appoint a business administrator whose term of office is also two years. Utah Code §53G-4-303 prescribes the duties of the business administrator, subject to the direction of the superintendent of schools:

- Attend all meetings of the local school board, keep an accurate record of its proceedings, and have custody of the seal and records.
- Be custodian of all district funds.
- Be responsible and accountable for all money received and disbursed.

- Keep accurate records of all revenues received and their sources.
- Countersign with the present of the local school board all warrants and claims against the district as well as other legal documents approved by the local school board.
- Prepare and submit a written monthly report of the district's receipts and expenditures to the local school board for approval.
- Use uniform budgeting, accounting, and auditing procedures and forms approved by the state board, which shall be under accordance with generally accepted accounting principles or auditing standards and Title 63J, Chapter 1, Budgetary Procedures Act.
- Prepare and submit a comprehensive annual statement to the local school board, detailing the district's revenue and expenditures for the period ending June 30. This statement should include the beginning and ending fund balances.
- Assist the superintendent in the preparation and submission of budget documents and statistical and fiscal reports required by law and the Utah State School Board.
- Ensure that adequate internal controls are in place to safeguard the district's funds.
- Perform other duties as the superintendent may require.

Additionally, the Business Administrator works with the Board President, Vice President, and Superintendent to prepare meeting agendas.

8.6 Monitoring Administrative Performance

The school board relies on the superintendent and business administrator for leadership and action. The school board is the "governing body", while the superintendent and the business administrator carry out the day-to-day work of the district. This means the board must place a good deal of trust in the superintendent and business administrator. Still, a school board also must be satisfied that the superintendent and business administrator are managing the district within board policies.

Here are some questions that each school board should consider:

- Does the board receive effective leadership from the superintendent/business administrator in the form of information, advice, and recommendations on board actions?

- Is the board adequately informed about the district's problems, progress, accomplishments, and needs?
- Do the board and superintendent/business administrator understand and support one another?
- Have the superintendent/business administrator established effective systems to promote best practices at all levels in the district?
- Does the superintendent/business administrator assist the board with making policy decisions?
- Do the board members and the superintendent/business administrator have a shared vision for the district?
- Does the superintendent/business administrator regularly evaluate the programs and operations of the school district?
- Does the superintendent/business administrator participate in regular professional development?
- Is the work of the superintendent/business administrator satisfactory? Is the feeling based on fact, informed opinion, or blind faith?

The board can use these questions to evaluate the relationship between the board and the superintendent/business administrator and make adjustments accordingly. An efficient monitoring and evaluation system offers advantages to both the board and the superintendent/superintendent as it necessitates their collaboration to clearly define their individual roles and duties, and establish a mutual understanding on how the execution of those responsibilities will be assessed.

It is required and expected that school board, superintendent and business administrator evaluations be completed annually, but it is at the discretion of the board how these evaluations occur. As a service to local school districts, the Utah School Boards Association (USBA) has developed effective evaluation tools for the school board, superintendent and the business administrator. These tools are available at the request of the board president and can be adapted to meet the individual needs of a school board.

8.7 The School Board Attorney

Most school boards rely heavily on having immediate access to legal counsel, as the role of a school administrator is increasingly filled with numerous legal challenges and risks.

While it is not necessary for most boards to have an attorney present at all meetings, some may choose to do so. Matters needing legal analysis are typically referred to counsel through the superintendent, or the attorney is asked to be present whenever a particular matter deems it necessary. In any event, each school board should have a policy that sets forth how it will fill its needs for legal assistance. Board members need to know how they will select and work with an attorney.

9. Conducting a School Board Meeting

School board meetings should be conducted in an organized and professional manner to ensure efficient decision-making, collaboration among members, and transparency in governance. Here are steps for conducting a school board meeting effectively:

Establish an Agenda:

- Create a comprehensive agenda listing the topics to be discussed, actions to be taken, reports to be presented, and any other relevant items. Distribute the agenda to board members and the public before the meeting.

Start on Time and Follow Protocol:

- Begin the meeting promptly at the scheduled time. Follow established protocols for opening the meeting, such as calling it to order, reciting the Pledge of Allegiance, and reviewing the agenda.

Public Comment Period:

- Allow community members to address the board on relevant topics by allocating time for public comments early in the meeting. It is recommended that the public comment portion of the meeting happen after teacher or student recognitions and other positive news to set a good tone. . Set time limits for each speaker to ensure fairness and manage the meeting's schedule.

Review and Approve Consent Agenda:

- Approve the minutes from the previous meeting. Correct any inaccuracies or omissions before approval.
- Approve warrants & financial reports, new hires and any other items not requiring discussion.

Reports and Presentations:

- Allow time for presentations and reports from the superintendent, board committees, staff, or guest speakers. Encourage concise and informative presentations.

Discussion of Agenda Items:

- Discuss agenda items thoroughly, allowing board members to ask questions, share perspectives, and deliberate on issues. Maintain focus and ensure discussions remain relevant to the agenda item being addressed.

Decision-Making and Voting:

- When necessary, take formal votes on motions or resolutions. Follow parliamentary procedures and ensure accurate recording of votes and decisions made during the meeting.

Time Management:

- Manage time effectively to ensure that discussions and presentations stay within the allocated time frames. Consider setting time limits for each agenda item to maintain meeting efficiency.

Maintain Order and Decorum:

- Encourage respectful dialogue among board members and attendees. Ensure that discussions remain civil and focused on the issues at hand and that all board members are given equal opportunity to speak. Address any disruptions or violations of meeting decorum promptly.

Adjourn the Meeting:

- Announce the date, time, and location of the next meeting before adjourning.

Evaluate Meeting Effectiveness:

- Regularly assess meeting effectiveness by gathering feedback from board members and stakeholders. Use this feedback to improve future meetings and address any concerns raised.

Conducting a school board meeting in an organized, transparent, and respectful manner allows for productive discussions, informed decision-making, and effective governance of the school district.

9.1 Voting Details

Voting during a school board meeting involves following established procedures to make decisions on various agenda items. Here's a guide on how a school board typically conducts voting:

- **Call for a Motion:** When an agenda item requires a decision or action, the board president calls for a motion. A board member usually makes a motion to address the issue. The motion must be clear and specific about what action is proposed.
- **Second the Motion:** Another board member must second the motion to indicate support for discussing the proposal. If no one seconds the motion, it typically dies without further discussion.
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 - The board president or chairperson calls for the vote by asking for all those who are in favor of the motion and then asking for those who are opposed.
 - Although Utah does not require a roll call vote for most decisions, a roll call vote is required to move into closed session. During a roll call vote, each board member responds individually, stating "yes," "no," or "abstain" when their name is called.
- **Counting the Votes:** The presiding officer or the business administrator tallies the votes to determine the outcome. The majority vote typically decides the action, but certain decisions might require a specific majority (e.g., simple majority, two-thirds majority) as specified in the bylaws or regulations.
- **Announcing the Results:** After the vote is counted, the presiding officer announces the results of the vote, specifying the number of votes for and against the motion, and whether the motion passed or failed.
- **Recording the Vote:** The minutes of the meeting should include a record of the motion, the names of board members voting for and against, and the outcome of the vote for documentation purposes.
- **Resolutions and Formal Actions:** For formal resolutions or significant decisions, the board might draft and approve a written resolution or official document summarizing the action taken.

- **Maintain Confidentiality and Transparency:** Ensure that votes and discussions are conducted with transparency, adhering to confidentiality requirements when discussing sensitive or private matters.

It's crucial for school boards to follow their established rules, bylaws, or parliamentary procedures regarding voting to ensure fairness, transparency, and effective decision-making during meetings.

10. Recording the Meeting

School board meeting minutes are more than a record of discussion—they are the legal evidence that the board fulfilled its duties according to the law. A school board can take official action only by majority vote at a legal school board meeting. After the meeting, the minutes serve as proof that those actions were authorized. Because they are legal documents, minutes must be accurate and complete. State law requires the business administrator to maintain a precise record of all board proceedings.

10.1 Courts rely on meeting minutes to resolve disputes.

Significant board actions, such as employee dismissals, often require legal guidance. Therefore, the wording of related motions or resolutions should be prepared with input from legal counsel.

10.2 The Recording Secretary

A suitable recording secretary, such as the business administrator, superintendent's secretary, or another designated staff member, should be responsible for taking, transcribing, and filing board minutes.

Each motion must be accurately recorded, including who made the motion and who seconded it. Minutes should be drafted promptly after the meeting and reviewed by both the superintendent board secretary before finalization.

During meetings, the secretary should be positioned to clearly see and hear all participants and be familiar with the agenda and supporting materials. In many districts, the same person who prepares the agenda also records the minutes.

10.3 Recording the minutes

State law and the open public meeting act requires keeping both an audio or video and an official set of written minutes for every board transaction.

Written minutes should be as brief as possible while still:

- Accurately recording each official action and the exact wording of motions and resolutions.
- Summarizing discussions (lengthy debates may be condensed) Supporting documents (budgets, plans, lengthy resolutions etc.) need not be retyped in full. Instead, incorporate them by reference, using a clear title, index

number, or file them with the minutes. The minutes must identify each document and its storage location to ensure a complete record.

Finally, number all resolutions, contracts, executive approvals, policy adoptions, and other actions in chronological order. Adding marginal notations or brief subject titles will make it easier to locate important items later.

10.4 Disposition of a Motion

The minutes must record the results of each motion before another motion is introduced. This requirement excludes subsidiary motions (e.g., to amend or table). If the presiding officer forgets that a motion remains pending, it is the duty of the secretary—or any board member—to remind them. **State law also mandates recording each member's individual vote.** Simply noting that a motion “passed” or “carried” is insufficient; every vote must be recorded separately. Minutes for board of education meetings must record, by name, how each board member voted on each issue that was voted on in the meeting. This requirement is contained in two sections of Utah Code 52-4-203, the statute in the Utah Open and Public Meetings Act which establishes requirements for minutes and recordings of open meetings. Subsection (2)(a)(iv) states, “(a) Written minutes of an open meeting shall include: . . . (iv) a record, by individual member, of each vote taken by the public body”.

What is meant by the requirement of a record by individual member as that applies to school board members is further illuminated by subsection (2)(c). That part of the statute refers to the prior subsection and states, “(c) A public body that has members who were elected to the public body shall satisfy the requirement described in Subsection (2)(a)(iv) by recording each vote: (i) in list format; (ii) by category for each action taken by a member, including yes votes, no votes, and absent members; and (iii) by each member's name.” By expressly referring to the subsection that says minutes must include a record by each member of each vote of the body and by specifying again the name of the person voting and the way the person voted, this makes it clear that minutes have to show by name how each board member voted on each matter the board of education voted on in the meeting. It is apparent from the statute that someone reading the minutes must be able to readily determine how a particular board member voted on each issue voted on by the board during the meeting.

10.5 The Contents of Recordings and Minutes

Under the Open and Public Meetings Act, minutes of all open meetings must include:

- Date, time, and place of the meeting -
- Board members listed as present or absent -
- Substance of all matters proposed, discussed, or decided (summaries of comments permitted) -
- Record of each member's vote -
- Names and brief summaries of testimony by non-board members -
- Votes to close (and reopen) any portion of the meeting, reason for closed session and location of the closed session.
- Any other information that a board member requests, as long as such information is a record of the proceedings of the meeting.

10.6 Type of meeting

The minutes should state whether the meeting was regular, reconvened, special, or emergency—along with the date, time, and place. If it is an adjourned meeting, the minutes should show the date of the meeting from which the adjournment was taken.

10.7 Reports and actions

Most open-meeting minutes should note:

- Members arriving late or leaving early (with times)
- Presentations by delegates/visitors and any board referrals
- Written communications/petitions read, with follow-up actions
- Committee and board member reports
- Administrative staff reports (numbered and filed as documents)
- Superintendent's report
- Motions on unfinished business
- Motions on new business
- Motions to close the meeting (with individual votes, times, and separate closed-session minutes)
- Motion to adjourn

10.8 Monthly statements

Each month the business administrator must present a written report of receipts and expenditures (showing budgeted amounts, expenditures to date, current bills, and unexpended balances for major funds and activity accounts.)

10.9 Current bills

When bills are approved via consent agenda, minutes must reference the list of audited invoices. If invoices are too numerous, record only the total approved amount with a reference to the itemized list on file. The record must indicate each invoice's amount, payee, purpose, and budget line item.

10.10 Contingent or special business

Boards often adopt resolutions to authorize complex transactions. Such resolutions must be included in the minutes—either in full or by reference. Best practice is to introduce each as a formal motion and record each member's yes/no vote, even when not strictly required by law.

Common resolutions include:

- Issuance/sale of tax warrants or bonds (with legal counsel approval)
- Establishment of revolving or trust funds
- Authorization to prepare a tentative budget
- Authorizing the acceptance of bids for maintenance, repairs, alterations, or new construction
- Authorizing the acceptance of bids for furnishing, supplies, equipment, or services
- Certification of the tax levy
- Ratification of teacher contracts
- Granting leaves of absence
- Submission of public questions/comments to referendum
- Adoption of superintendent or business administrator contracts
- Recording retirements

10.11 Other Official Requirements

Though not statutorily required, it is advisable to approve minutes at the next regular meeting so inaccuracies can be corrected promptly. A board cannot

change prior actions by amending minutes, though actions themselves may be rescinded or revised later.

Certification of Minutes The business administrator should certify the minutes as the lawful record of board actions. Boards may adopt special certification forms if desired.

10.11.1 Amendments to Minutes

Minutes may be amended at any time to reflect what actually occurred, even if board membership has changed. However, amendments cannot alter the substance of actions taken—only the record of those actions. Courts are reluctant to allow oral-evidence amendments unless minutes are clearly deficient.

10.11.2 Distribution of Minutes

Draft minutes should be distributed with the next meeting's agenda so members can review them. Approved minutes may then be circulated or attached to agendas. Closed-session minutes, due to confidentiality, are typically shared only at subsequent closed meetings and then collected.

10.12 Storing and Indexing

Because recordings and minutes of school board meetings are official records, each school district is responsible for maintaining these records. The district may also devise some system for indexing the minutes of its school board meetings so that specific actions or topics can be located. Most districts also keep and maintain electronic versions of board agendas and minutes.

10.12.1 Storing minutes

The traditional method for conveniently storing minutes is in a loose-leaf book, of convenient size, with a stiff cover. It may be useful to print blank forms to be filled with regular and recurring data. Where meeting materials are more voluminous, business administrators may find it helpful to store meeting packets, complete with agendas, approved minutes, and other official documents related to each meeting. The board's official copy of the minutes, signed by the business administrator (and sometimes the president) as approved, should be kept in a secure location. Documents that belong to or with the minutes should be kept in the same location. The

minutes of closed meetings should be kept in a separate confidential file and may only be made public under court order.

10.12.2 Indexing

Usually, the minutes are filed in a minute book with numbered pages, bound annually, and placed in a convenient location. A chronological index, arranged by meeting dates, may be developed each year and bound with the official copy of minutes for that period. A topical or subject index is also recommended. School system needs will determine the degree of sophistication required. A subject index can be maintained on separate pages bound with the minutes, in a separate computer file, or through computerized indexing of digitized records. Search engines in most database and word-processing programs make it easy to search records for key words or phrases. Electronic indexing is particularly helpful to researchers and archivists, so even if an index is kept on pages of a paper minutes book, a computerized version should be maintained to allow efficient updating

10.13 Public Records

Board minutes are public records. The board must retain them permanently and make them available for inspection during business hours under reasonable controls. Many districts post minutes online to reduce in-person requests. GRAMA Requests Under Utah's GRAMA, any citizen may request minutes. Boards may charge reasonable copy fees. Online posting of minutes and recordings helps meet these requirements.

10.13.1 Open Meeting Notification

As interpreted by the State Auditor, local school boards are subject to the requirements for state public bodies, which means that pending minutes have to be made available to the public within 30 days of the meeting, approved minutes have to (1) be posted to the state website and (2) be made available at the main office within 3 days of approval, and the RECORDING of the meeting must be made available by link or by posting on the state website within 3 business days of the meeting.

11. Encouraging Public Participation

By state statute and under the Open and Public Meetings Act, school boards are legally required to encourage public participation in their meetings to ensure transparency, community engagement, and mutual understanding. Here are some strategies boards may implement to promote and enhance public involvement:

- **Publicize Meeting Information:** Advertise meeting dates, times, and locations well in advance through various channels, such as the district website, social media, local newspapers, newsletters, and community bulletin boards.
- **Create a Welcoming Environment:** Ensure that the meeting location is easily accessible, welcoming, and accommodates the public's attendance comfortably. Consider factors like seating arrangements and accessibility for individuals with disabilities.
- **Provide Opportunities for Public Comment:** Allocate dedicated time during meetings for public comments or questions on agenda items or other relevant topics. Establish reasonable time limits per speaker to accommodate multiple voices.
- **Establish Clear Guidelines for Participation:** Develop and communicate clear guidelines or rules for public participation to maintain decorum, respect, and relevance during the meeting. Ensure that these guidelines are easily accessible to the public.
- **Offer Remote Participation Options:** Consider providing remote access or live streaming of meetings for those unable to attend in person. Virtual participation through video conferencing or online comment submissions can broaden participation.
- **Encourage Collaboration and Input:** Invite stakeholders to participate in decision-making processes by seeking their input on important matters, such as policy development, budget planning, and curriculum changes.
- **Respond to Public Input:** Acknowledge and address concerns raised by the public during meetings. Even if immediate solutions aren't possible, ensure that feedback is considered and responded to appropriately.
- **Promote Transparency:** Share meeting agendas, minutes, and relevant documents in advance to provide the public with sufficient time to review and prepare comments or questions.

- **Recognize and Appreciate Engagement:** Acknowledge and appreciate public participation to demonstrate the board's value for community involvement and contributions.

By implementing these strategies, school boards can foster an inclusive and participatory environment that encourages community members to engage actively in school board meetings and contribute meaningfully to the decision-making process.

11.1 Responding to Patron Complaints and Concerns

Effectively responding to complaints and concerns is crucial for a school board to maintain transparency, build relationships of trust, and uphold its responsibilities. Here are steps a school board can take to manage complaints and criticism effectively:

- **Establish Clear Procedures:** Develop clear and accessible procedures for receiving, documenting, and addressing complaints. Ensure these procedures are known to the public and stakeholders.
- **Listen Actively and Empathetically:** Create a culture of active listening and empathy when receiving complaints. Give individuals the opportunity to express their concerns fully without interruption or judgment.
- **Acknowledge and Validate Concerns:** Acknowledge the legitimacy of concerns or criticisms raised. Validate the emotions behind the complaints and express understanding of the impact they may have.
- **Respond Promptly and Professionally:** Create a procedure for board members to respond promptly to complaints, preferably within a reasonable timeframe. Responses should be professional, respectful, and address the specific issues raised.
- **Maintain Confidentiality When Appropriate:** Respect confidentiality where necessary, especially when dealing with sensitive matters or personal information.
- **Offer Solutions or Redress:** Offer practical solutions or redress whenever possible. Work collaboratively with the complainant to follow proper chains of command and seek resolutions.
- **Document and Review:** Create a process to document complaints received, actions taken, and resolutions reached. Regularly review complaint patterns to identify systemic issues that need attention. Most complaints should and will be resolved at the classroom/school level and should be

communicated to the lowest level for resolution before being resolved at the board level.

Dealing with complaints and criticism in a proactive, respectful, and transparent manner not only resolves immediate issues but also fosters trust, enhances community relations, and strengthens the credibility of the school board.

11.2 Building trust with the Public

USBA and school boards throughout the state believe that districts will never be as strong and vibrant as the families in their communities. As such, we are committed to fostering strong relationships with our parents, families, and communities. Improving the parent-board relationship so that parents feel heard and empowered at the local level comes down to three core pillars: access, transparency and collaboration.

Access:

Providing more opportunities outside of regular board meetings for communities to bring a concern and get answers in real time, can help the public develop a better relationship with school boards. A better process to allow for more frequent communication can leave the public feeling more informed and connected.

Collaboration:

Including more parent or community feedback before big decisions (such as student safety, educational quality, or budget concerns) are made at the board level can enhance trust relationships with parents and communities.

Transparency:

By proactively inviting community/parent input then demonstrating how that input influences board decisions can help stakeholders understand district processes with more clarity and learn to trust their elected board members more fully.

By promoting more access to boards for communication, effective collaboration, and continual transparency, boards can help build a positive relationship with the community it serves.

11.3 Sample Policy: Public Participation at Board Meetings

From Juab School District Policy (9/20/2023)

Every meeting of the Board shall be open to the public unless closed pursuant to Utah Code §§ 52-4-204, 52-4-205, and 52-4-206.

Utah Code § 52-4-201(1) (2006)

Public Comment

At open meetings other than work sessions or emergency meetings, the Board will receive verbal and written comments from the public on topics which are germane to the Board's authority. Written comments can be submitted electronically to the district before the meeting; or by hand delivering them to District staff members at the meeting. Written comments will not be read at the meeting but will be provided to the members of the Board and will be included in the meeting minutes.

Verbal comments at the meeting shall be received from members of the public who sign up prior to the time for public comment and will be taken in the order that individuals sign up. Each individual will be allowed up to 3 minutes to provide comments to the Board. The Board's agenda will specify the amount of time for public comment, which will generally be between 30 minutes and 1 hour.

Utah Code § 52-4-201.3 (2023)

By allowing public comment, the Board does not endorse any idea or comment that is made from community members. Therefore, persons providing comment bear any and all legal liability which may arise under governing law from making such comments. For example, defamatory comments about specific individuals may expose the commenter to legal liability from those individuals; similarly, threats of violence towards other individuals may expose the commenter to prosecution.

The public comment period is to allow members of the public to provide input to the Board in its capacity as a legislative body. The public comment period is not a forum for discussion or debate between the Board and members of the public. The Board does not engage in discussion during public comments, but may later follow up on comments made during public comment.

Public hearing

A public hearing is an open meeting at which members of the public are given a reasonable opportunity to comment on a subject of the meeting. The Board shall hold a public hearing when considering whether to close a school or change the boundaries of a school, when submitting a ballot issue regarding bond authorization or a tax increase, when considering the adoption of the District budget, before authorizing issuance of bonds, and when considering changes to the Board member compensation schedules, as required by statute.

Utah Code § 11-14-318 (2023)

Utah Code § 53G-4-402(23) (2023)

Utah Code § 53G-7-303(3) (2019)

Utah Code § 53G-4-204(2) (2023)

Utah Code § 59-1-1605 (2016)

Interference With Conduct of Board Meetings

Those in attendance at Board meetings are prohibited from interfering with the conduct of the meeting by demonstrations, whether audible or visual or by conduct. Those who do not abide by Board procedures for orderly presentation of comments when permitted may be asked to leave or the Board may use appropriate legal means to remove those disrupting the meeting.

Distribution of handbills, flyers, or other printed materials by members of the public is prohibited during Board meetings. Similarly, members of the public may not circulate petitions or similar requests for participation during a Board meeting.

12. Working with the News Media

School boards can effectively work with the news media to ensure accurate reporting, share information, and maintain transparency. Here are some best practices for school boards to engage with the news media:

- **Establish Relationships:** Build and maintain positive relationships with local journalists and media outlets. Establishing rapport helps foster understanding and trust.
- **Follow Board Norms and Policy Regarding External Communication:** Each individual board and district will establish their own norms and processes for external communication. Working closely with board and district leadership is crucial in maintaining clean and congruent communication.
- **Appoint a Media Liaison:** Designate a spokesperson (often the superintendent) or media liaison within the school board or district administration to handle media inquiries and facilitate communication.
- **Be Accessible and Responsive:** The designated spokesperson for the board should be available and responsive to media requests for information or interviews. Timely responses can prevent misinformation or speculation.
- **Provide Accurate Information:** The designated spokesperson should ensure that information provided to the media is accurate, factual, and up-to-date. Avoid speculation or dissemination of unverified information.
- **Be Transparent and Open:** The designated spokesperson should practice transparency by sharing relevant information with the media, especially regarding important decisions, policies, or events within the school district.
- **Offer Opportunities for Engagement:** The board may consider organizing press conferences, media briefings, or interviews to provide insights into school board decisions, initiatives, or key educational issues.
- **Prepare Spokespersons:** Train and prepare designated spokespeople to effectively communicate key messages, stay on topic, and handle difficult questions from journalists.
- **Share Success Stories:** Highlight positive achievements, success stories, and innovative programs within the school district to showcase its strengths and successes.
- **Respect Deadlines and Press Ethics:** The designated spokesperson should honor media deadlines and respect the ethical standards of journalism. Avoid attempting to control the narrative or manipulating information.

- Address Concerns or Issues Promptly: Concerns or issues raised by the media should be addressed promptly and accurately, usually delegated to the superintendent. Be open to providing clarification or additional information when needed.
- Use Social Media and Online Platforms: Utilize social media and online platforms to share news updates, announcements, and information directly with the public and media.
- Prepare Press Releases and Media Kits: Create press releases, media kits, or information packets that provide comprehensive details about important events, policies, or initiatives.
- Build Long-Term Relationships: Foster ongoing relationships with journalists beyond immediate needs, establishing a foundation of mutual respect and understanding.

By following these practices, school boards can effectively collaborate with the news media, enhance public understanding, and ensure accurate reporting, ultimately contributing to a positive portrayal of the school district and its initiatives.

Appendix A: Local Administration, School Districts

[Title 53G Outlines requirements for School Districts](#)

[Chapter 1 Title Provisions](#)

[Chapter 2 Local Public Education System Policy](#)

[Chapter 3 School District Creation and Change](#)

[Chapter 4 School Districts](#)

[Chapter 5 Charter Schools](#)

[Chapter 6 Participation in Public Schools](#)

[Chapter 7 Public School General Requirements](#)

[Chapter 8 Discipline and Safety](#)

[Chapter 9 Health and Welfare](#)

[Chapter 10 Curriculum Participation and Requirements](#)

[Chapter 11 Employees](#)

Appendix B: Utah Open and Public Meetings Act (2023)

[52-4-101. Title.](#)

[52-4-102. Declaration of public policy.](#)

[52-4-103. Definitions.](#)

[52-4-104. Training.](#)

[52-4-201. Meetings open to the public – Exceptions.](#)

[52-4-201.3. Local school boards – Public comment.](#)

[52-4-202. Public notice of meetings – Emergency meetings.](#)

[52-4-203. Minutes of open meetings – Public records – Recording of meetings.](#)

[52-4-204. Closed meeting held upon vote of members – Business – Reasons for meeting recorded.](#)

[52-4-205. Purposes of closed meetings.](#)

[52-4-206. Record of closed meetings.](#)

[52-4-207. Electronic meetings – Authorization – Requirements.](#)

[52-4-208. Chance or social meetings.](#)

[52-4-209. Electronic meetings for charter school board.](#)

[52-4-210. Electronic message transmissions.](#)

[52-4-301. Disruption of meetings.](#)

[52-4-302. Suit to void final action – Limitation – Exceptions.](#)

[52-4-303. Enforcement of chapter – Suit to compel compliance.](#)

[52-4-304. Action challenging closed meeting.](#)

[52-4-305. Criminal penalty for closed meeting violation.](#)

<https://le.utah.gov/xcode/Title52/Chapter4/52-4-S305.html>

Appendix C. Foundational Principles of Effective Governance

As the corporate entity charged by law with governing a school district, each school board sits in trust for its entire community. The obligation to govern effectively imposes some fundamental duties on the board:

1. The Board Clarifies the District Purpose

As its primary task, the board continually defines, redefines and articulates district ends to answer the recurring question-who gets what benefits for how much?

2. The Board Connects With the Community

The school board engages in an ongoing two way conversation with the entire community. The purpose of the conversation is to enable the board to hear and understand the community's educational aspirations and desires, to serve effectively as an advocate for continuous improvement, and to inform the community of the district's performance.

3. The Board Employs a Superintendent and a Business Administrator

The board employs and evaluates two people, the superintendent and business administrator, and holds them accountable for the performance of the school district. The board delegates authority to the superintendent for employing and evaluating district staff.

4. The Board Delegates Authority

The board delegates authority to the superintendent to manage the district and provide leadership for the staff. Such authority is communicated through written policies that designate board ends and define operating limits.

5. The Board Monitors Performance

The board constantly monitors progress toward district ends and compliance with written board policies.

6. The Board Takes Responsibility for Itself

The board, collectively and individually, takes full responsibility for board activity and behavior. Board deliberations and actions are limited to board work, not staff work.

Appendix D. Possible Annual Agenda Items

The following are examples of items that a school board and superintendent may decide to include on the board meeting agenda each month.

The items listed on this "annual calendar" are merely suggested as possibilities. Some items are required by law, and have important deadlines which should be included in any school board's annual agenda. Many of the items listed here may be placed at different times throughout the year.

January

- Swear in newly elected board members (only in odd-numbered years).
- At the first board meeting in January the board shall elect a board president and vice president (only in odd numbered years).
- Swear in the board president and vice president.
- Review board goals and objectives.
- Attend the USBA Annual Conference.

February

- Consider a resolution to sell building bonds.
- Study the need for policy or adequacy of policy in selected areas.
- Review superintendent and business administrator evaluation policy and procedures (Contact USBA for evaluation tool).

March

- Confirm the sale of building bonds.
- Appoint leader preparation program candidates for next year.
- Approve professional leave requests for next year.
- Study the need for policy or adequacy of policy in selected areas.
- Remind board, superintendent, and business administrator to attend USBA Region meeting.

April

- Present Teacher of the Year awards.
- Establish board meeting schedule for the coming year.
- Review and adjust district fee schedules for the next school year.

- Study need for policy or adequacy of policy in selected areas.
- Report on board's attendance at NSBA convention, including possible new ideas for implementation.
- Start the selection process for new student school board member(s).

May

- Thank the PTA organization for their volunteer service this school year.
- Approve retirement requests.
- Consider superintendent's recommendations for administrative appointments.
- Review the need for policy in consideration of actions at the Utah State Legislature.
- Review graduation attendance and speaking assignments.
- Conduct annual superintendent and business administrator evaluation

June

- Conduct budget hearings for old and new budgets.
- Announce truth in taxation if needed.
- Adopt final legal budget for current year.
- Discuss and adopt tentative budget for next fiscal year.
- Appoint or re-appoint business administrator or superintendent (every other year).
- Ratify or reject certified negotiated agreement for the coming year.
- Set administrative salary schedule for the coming year.
- Ratify or reject classified negotiated agreement for the coming year.
- Evaluate School Professional Development Plans, School Improvement Plans, Elementary Reading Achievement Plans, and School Trust Lands Plans.
- Study need for policy or adequacy of policy in selected areas.
- In closed session, evaluate the superintendent and/or business administrator.

July

- Set the tax rates for the coming year.
- Study the need for policy to address new legislation.

August

- Conduct a board self-evaluation (best handled in a training session).
- Study the need for policy or adequacy of policy in selected areas.

September

- Review, evaluate and set board goals (best handled in a training session).
- Review tentative attendance numbers and their ramifications.
- Study the need for policy or adequacy of policy in selected areas.

October

- Review official attendance numbers and their ramifications.
- Review official annual state testing reports
- Study the need for policy or adequacy of policy in selected areas.
- Remind board, superintendent, and business administrator to attend USBA Region meeting.

November

- Approve school calendar for the next school year.
- Study the need for policy or adequacy of policy in selected areas.
- Remind board, superintendent and business administrator to register for USBA State Convention.

December

- Receive and approve or disapprove the Independent Financial Audit Report and report to the public on the district's financial health.
- Approve or disapprove the District Annual Financial Report.
- Study the need for policy or adequacy of policy in selected areas.

Appendix E: School Board Professional Governance Standards (adopted 2022)

School board members are elected to represent the community and advocate for all public education students.

These Standards, based on best practice and research, are designed for Local School Boards to use as a common framework of excellence in school board governance.

Duties of the School Board

1. Sets the general direction and expectations of the School District.
2. Hires, supervises, and evaluates the Superintendent and Business Administrator.
3. Determines employee compensation and makes ultimate decisions on hiring and termination.
4. Establishes the District vision, goals, and priorities.
5. Develops, adopts, and revises policies for District and Board operation as required by law and as determined by the Board.
6. Approves a balanced budget that supports District vision and goals, approving all expenditures.
7. Oversees implementation of the District plan, including establishment and operation of schools, and adoption of school curriculum.
8. Ensures accountability and sets clear expectations for administration and staff.
9. Reports as required by law to the Utah State Board of Education and communicates as required with parents.

Utah Code 53G

Effective board members are:

Respectful

- Approach role with integrity

- Treat board members, families, employees, students, and community members with dignity and consideration
- Listen to and acknowledge stakeholder input
- Safeguard confidentiality

Engaged

- Connect community and district by involving families and other stakeholders
- Commit to the work of the board with resilience and a spirit of inquiry
- Are prepared, attentive, and active participants in meetings

Collaborative

- Develop a cohesive board team
- Seek for understanding
- Problem-solve within proper roles
- Support board decisions
- Avoid promoting a personal agenda

Knowledgeable

- Understand and follow state and federal law, administrative rule, and board policy
- Understand board member duties, roles, and responsibilities
- Seek continual improvement through professional development
- Make decisions informed by data

Accountable

- Focus on student achievement
- Communicate data-driven results
- Ensure fiscal responsibility
- Model ethical and transparent behavior
- Build public trust

Advocates

- Champion public education
- Promote student success
- Seek support for local governance and district needs
- Develop relationships with community and state leaders

Appendix F: A Model for Orienting New Board Members

One of the USBA Foundational Principles of Effective Governance states that "the school board takes responsibility for itself," meaning its own procedures, activities and behaviors. An essential part of any board's activities should be the orientation and training of newly elected members.

Following is a comprehensive list of areas that might be covered during the orientation of new school board members. Each school board should review this list to determine what is applicable locally and should take action to ensure that new members are adequately prepared to take their seats at the board table.

Orientation to the Board:

These items are generally the school board's areas of expertise and, therefore, should be the board's responsibility in the orientation process. Often, the board president will take the lead for this part of the orientation process with the assistance of the superintendent and other members of the board.

1. A personal copy of the written board policy manual and explanation of its use development, review, etc., including the following:
 - A copy and explanation of the district's mission, vision, values and beliefs, and/or educational philosophy.
 - A copy and explanation of the district's latest short- and long-range goals, along with related needs assessment results.
 - An explanation of school board organization (including officers and standing or ad hoc committees, if any).
 - An explanation of any policies governing board member conduct and activities (for example, code of conduct, travel expenses, conflict of interest, and professional development).
 - An explanation of how board meetings are conducted, including parliamentary procedures used, Open and Public Meetings Act requirements, placing items on the agenda, superintendent's informational packets, etc.
 - A discussion about the board's need to speak with one voice, the authority of the board vs. the authority of any individual board member, the chain of command, etc.

- An explanation of board processes, such as gathering community input, monitoring district progress, self evaluation and communication with the media.
2. A historical summary of the board's current work, including how to access minutes from the past year's board meetings.
 3. An explanation of the superintendent's informational packets and communication methods.
 4. An explanation and list of board and board member development opportunities available throughout the year including USBA's New Board Member Workshop and the Annual Conference.

Orientation to Board/Superintendent Roles and Relationships: These items are generally shared areas of expertise between the board and superintendent, and, therefore, should be a joint responsibility in the orientation process.

1. Clarification of roles and responsibilities including discussion about "who decides" particular types of issues.
2. Explanation of how authority is delegated to the superintendent.
3. Explanation of the administrative procedures manual.
4. A copy of the superintendent's job description and performance-based contract and discussion of how it evolved.
5. A copy of any superintendent evaluation materials and discussion of how and when they are used.
6. An explanation of how communication flows between board members and superintendent and how to use the chain of command.
7. A review of written board policies governing the board/superintendent relationship.
8. Orientation to the District:

These items are generally the superintendent's areas of expertise and responsibility in the orientation process.

1. School Finance

- A copy of the district's budget. Explanation of how, when and by whom it is prepared; how the district's mission and goals are translated into a dollars and cents plan; where the money comes from, where it goes and how it gets spent.
- An explanation of financial accountability processes: how funds are accounted for; how expenditures are authorized; what financial reports are provided and how to interpret them, etc.
- An explanation of the state's financial plan and what it means in terms of local district budget.
- Data on district per-pupil cost and expenditures.
- An explanation of the assessed valuation and tax structure of the district.
- An explanation of the funding process for the school district.
- A description of the district's student enrollment trends and projections.
- Data on the existing bond indebtedness of the district and when various building debts will expire.
- Information on federal and state aid to the district's education program.

2. School District Facilities and Transportation

- A list showing the number, location, and condition of schools and other buildings owned and/or operated by the district.
- An explanation of construction projects contemplated and in process.
- A description of the district's building maintenance program.
- An explanation of the student transportation system the number, condition and maintenance program of district-owned vehicles and/or the contract for transportation services.
- A description of the geographic boundaries and attendance zones of the school district.

3. School Curriculum and Instruction

- An explanation of curriculum standards required by state law and implemented by the State Board of Education.
- Copies of recent state and/or accrediting agency evaluations.
- An explanation of the district's overall curriculum program.

- An explanation of local school improvement initiatives (what, why, who, how).
- An explanation of the educational organization of the district, including student groupings, departmentalization, team-teaching, shared pupils/teachers, etc.
- An explanation of how elementary and secondary curricula are coordinated.
- Student dropout statistics.
- Information on standardized testing, recent test results and the uses of test results.
- Data on the percentages of students who go on to college or other post high school programs.
- Documents showing teacher-pupil ratio and median class size for the district and for appropriate sub-groupings.
- 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.
- Data on age and condition of textbooks and other school equipment.
- A description of libraries, technological tools and other instructional materials in use now or planned for the future.
- A listing of extra- and co-curricular activities in the district.

4. Administration and Staff

- A copy of the job description of the superintendent, business administrator and other top administrators.
- An organization chart of the school district's management structure.
- An explanation of personnel recruitment and hiring procedures.
- A copy of staff salary schedules and fringe benefit programs, including data on average and median salaries of teachers and administrators.
- Data on staff-administrator ratios.
- A copy of the district's collective bargaining agreements and a brief history of the recent collective bargaining activities in the district.
- An explanation of the district's evaluation criteria and procedures for administrators, teachers and support staff.
- An explanation of the district's orientation program for new teachers.
- An explanation of the district's staff development program.

5. School-Community Relations

- An explanation of programs, activities and interests of education-oriented groups and associations (i.e., PTA/PTO, booster clubs, education foundations, advisory committees).
- An explanation of the district's public relations program, how it is coordinated, and what activities regularly take place.

Appendix G: A Model for Orienting New Student Board Members

Some school boards will decide to include students as part of their board. Although these students are not allowed to vote on legal issues, they can provide valuable input to the board.

Phase 1: Orientation & Foundations

1. Welcome & Introduction to the Board

- Meet with the School Board President and Superintendent
- Overview of the Board's mission, vision, and role in district governance
- Introduction to board members and key district leaders

2. Understanding School Governance

- Structure and function of the school board
- Overview of state and federal education policies affecting the district
- The role of student representation in decision-making

3. Meeting Procedures & Protocols

- How to prepare for board meetings
- Understanding agendas, motions, and voting processes
- Public speaking and effective communication strategies

Phase 2: Leadership Development & Engagement

4. Policy Creation & Revision Training

- Overview of policy development process
- Participating in policy discussions and recommendations
- Case studies of past policy changes and student impact

5. Communication & Public Engagement

- Role in the Board Communication Committee
- Strategies for gathering student input and concerns
- Media training: engaging with press, social media guidelines

6. Professional Development Workshops

- Leadership and advocacy training
- Conflict resolution and problem-solving
- Time management and balancing responsibilities

Phase 3: Active Participation & Mentorship

7. Mentorship & Networking

- One-on-one mentoring with an assigned Board Member
- Shadowing a district administrator for insights into policy implementation
- Networking with student representatives from other districts

8. Leading Initiatives & Projects

- Developing a student-led initiative to address a key district issue
- Hosting a student forum to collect feedback on policies
- Presenting findings and recommendations to the board

Phase 4: Reflection & Future Leadership

9. Reflection & Lessons Learned

- Reviewing accomplishments and impact
- Creating a transition plan for the next Student Board Member
- Writing a final report with recommendations for future student involvement

10. Graduation & Recognition

- Official acknowledgment at the final board meeting
- Certificate of service and letter of recommendation
- Continued involvement opportunities post-term

Appendix H: Screening Candidates to Fill a School Board Vacancy

Every school board at one time or another must face the task of filling a vacancy. In many cases, the remaining members find themselves in a recruitment mode, trying to find someone they want who is willing to serve.

1. How Vacancies Are Filled

- Local School Board Responsibility:
 - Must fill the vacancy by appointment within 30 days of vacancy (or 45 days if the vacancy is due to death).
 - If Board Fails to Act:
 - If no appointment is made within the timeframe (30 days or 45 days) the county or city legislative body is required to appoint the vacancy.
 - Appointed Member's Term:
 - Serves until a successor is elected or appointed and qualified.
-

2. When a Special Election is Required

- Interim Appointment plus a Special Election happens if:
 - The vacancy or resignation is at least 14 days before the filing deadline for candidacy.
 - Two years remain on the term after the first Monday in January following the next school board election.
 - Outcome:
 - The elected individual serves the remainder of the two-year term.
-

3. Public Notice Requirements (Before Appointment)

Before filling the vacancy, the Board **must**:

- Post a Public Notice:
 - At least 2 weeks before the meeting to fill the vacancy.

- Include in the Notice:
 - Date, time, and location of the meeting.
 - How and where to submit names for consideration.
 - Deadline for name submissions.

4. Interview and Selection Process

- **Interview Process:**
 - As a whole board, in an open meeting, interview each candidate whose name was submitted for consideration and who meets the qualifications for office. All Interviews and discussions of a person applying to fill an elected position (or potential applicants) must be held in an open meeting.(Utah Code§ 52-4-205).
- **Selection Process:**
 - The Board must deliberate and make their final selection in a properly convened public meeting.

5. Qualifications and Selection Process

It is recommended that each school board determine a specific set of qualifications they are looking for in a new member. It is important for the board to create a set procedure to follow in order to evaluate candidates consistently and fairly. Some examples of procedure items could include: Scoring rubrics, consistent interview questions, consistent interview tasks, etc.

Appendix I: Closing Schools and changing boundaries

This appendix outlines the required steps and procedures that school districts must follow when closing a school, changing school boundaries, or relocating a special enrollment program, according to **Utah Code 53G-4-402 (amended 2024)**.

1. Initiating the Process

- The local school board must **make and approve a formal motion** during a public board meeting to begin the notification process before any closure or boundary change is considered.
-

2. Parent and Community Notification

- **At least 90 days before** approving a school closure vote, or **30 days before** approving a boundary change vote, the board must provide notice to:
 - Parents of students enrolled at the affected school(s) (both through regular communication channels and by U.S. mail).
 - Parents of students at other schools that may be affected.
 - The governing council and mayor of the municipality where the school is located.
-

3. Public Hearing Requirements

- A **formal public hearing** must be held:
 - Notice must include the **school name(s)** and **date, time, and location** of the hearing.
 - If feasible, the hearing should be held at the school under consideration.
 - Notice must be **published at least 10 days** before the hearing as a **Class A notice**.
 - Notice must also be **sent at least 30 days** before the hearing by regular communication and U.S. mail.

:

4. Public Comment Requirements

- The board must allow:

- **Two public comment opportunities** at local board meetings for a **school closure**.
 - **One public comment opportunity** for a **boundary change**.
-

5. Decision and Timing

- **For School Closures:**
 - The board must complete all closure processes and make a final decision **on or before December 31** of the year prior to the closure taking effect.
 - **For Boundary Changes:**
 - The board must finalize the boundary change decision **within 60 days** after voting to approve it.
-

6. Student Enrollment Options After Changes

- After a boundary change, parents of affected students must be allowed at least **30 days** to submit an **out-of-area enrollment request**.
-

7. Separate Motions Required

- Each school under consideration for closure must be **addressed in a separate motion** (not bundled together).

Appendix J: Simplified Chart of Parliamentary Motions

Motion & Order of Precedence	You Say:	Debatable	Amendable	Vote Required
1. Recess	I move to recess for	No	No	Majority
2. Close Debate	I move the previous question (call for the question)	No	No	2/3
3. Postpone Indefinitely	I move to postpone the motion to	Yes	Yes	Majority
4. Refer to Committee	I move to refer the motion to	Yes	Yes	Majority
5. Amend the Amendment	I move to amend the amendment by	Yes	Yes	Majority
6. Amend or Substitute	I move to amend the motion by	Yes	Yes	Majority
7. Main Motion	I move to	Yes	Yes	Majority
8. Point of order (to enforce rules)	Point of Order	No	No	None
9. Parliamentary Inquiry	Parliamentary questions	No	No	None
10. Withdraw or Modify a Motion	I withdraw (or modify) my motion	No	No	Majority

Appendix K: A Suggested Public Comment Script

As we move into Public Comments, I want to remind those who have signed up that they will have 3 minutes to speak. Those speaking will be called in the order they signed up for.

A sign-up sheet was available prior to this meeting allowing up to ten patrons the opportunity to speak. Those living outside of the district and those who were unable to sign up before the sign-up sheet was full can submit written comments online or by sending them to the board members.

Once your name is called, please come forward and state your name clearly in the microphone. All comments are recorded so please speak clearly into the microphone.

Once the timer expires, we ask that you return to your seat.

Please refrain from using profane language, making threats, or revealing confidential student or staff information. Personnel issues are not appropriate discussion items for an open meeting environment. If you have a personnel concern, please contact a member of the administration or put your concerns in writing to the board..

We want to remind you that the board is here to listen during public comment, but we will not respond to any comments or questions you may have. A member of the administration may be able to answer your questions later.

(As needed: The school board is a legislative body, and as such it functions under the same operational rule as other similar bodies, such as the State Legislature. Public input during its formal meetings is to assist the Board in ascertaining public attitudes and interests. It is not a forum for open discussion or debate between the board and patrons.)