





OSBA mission

OSBA leads the way to educational excellence by serving Ohio's public school board members and the diverse districts they represent through superior service, unwavering advocacy and creative solutions.

OSBA vision

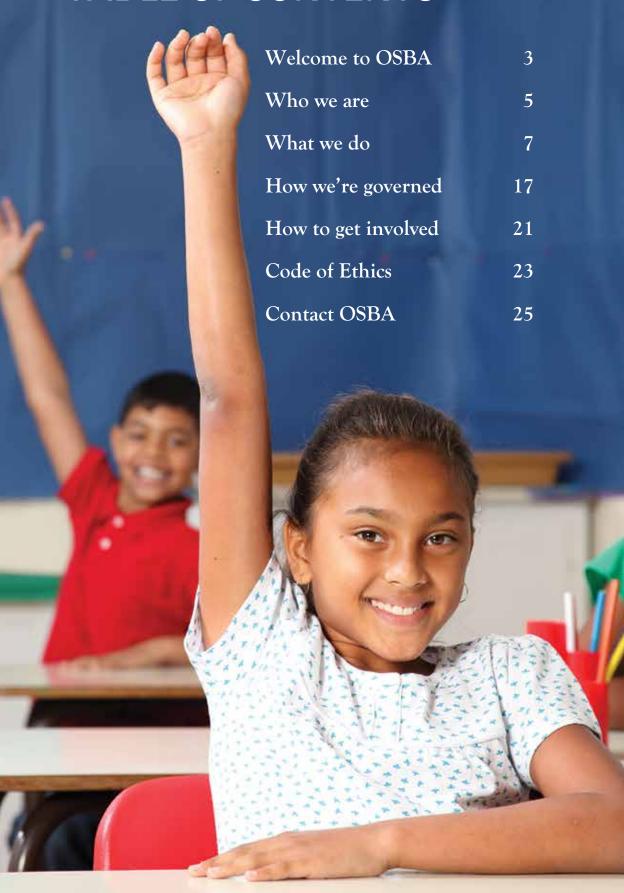
OSBA is the recognized and respected voice of public education, leading through demonstrated expertise, active and engaged membership, and superior service in a competitive, global environment.

OSBA's guiding principles

The guiding principles are the attitudes, mind-sets or beliefs about how work should be accomplished within our organization and how people should act as they work toward accomplishing OSBA's vision.

- We value and expect effective communication.
- We value and expect integrity.
- We value and expect collaboration and partnership.
- We value and expect superior customer service.
- We value and foster expertise.

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WELCOME TO OSBA

As a newly elected or appointed school board member, you are an integral part, not only of your school board, but also of a dynamic education association. This guide shows you the many opportunities available to you through your OSBA membership.

OSBA is dedicated to serving the needs of school board members and the districts they serve. Our benefits are designed to help prepare you for your duties, overcome tough challenges and find your way to successful boardmanship. They include:

Statewide and local training opportunities: Develop your boardmanship/leadership skills and earn recognition for your achievements through our variety of workshops.

Legislative advocacy at the local, state and federal level: OSBA actively represents the interests of school board members concerning critical issues such as school-funding reform. OSBA also monitors state and federal agencies to assess regulations affecting schools.

Consulting services: Our experienced staff provide both dues-based and feebased services in board-superintendent relations, board-treasurer relations, board effectiveness and governance, labor relations, policy services, school law, state and federal legislation, communications, human resources and more.

OSBA staff: OSBA staff provide top-notch customer service and are always ready to serve you.

Award-winning periodicals: Stay up-to-date on best practices and the latest developments in school governance with the OSBA *Journal* magazine and our numerous publications, including the *Briefcase*, *School Management News*, *School Law Summary* and *Policy Development Quarterly*.

Comprehensive information resources: With in-depth publications and online subscriptions, OSBA is your best source of information on education issues.

We hope you will take advantage of all the resources supported by your membership dues. Congratulations and welcome to the world of boardmanship. Let us know how we can help you on your journey. We're only a phone call or email away.

To learn more about OSBA, visit www.ohioschoolboards.org.



WHO WE ARE

Ohio school board members began holding conferences in 1950 to discuss the challenges facing public education. Over the next five years, four regional associations were formed and they banded together as the Council of Ohio Regional School Boards Associations in an effort to coordinate activities. In 1955, the Ohio School Boards Association was formed to unite those councils in a statewide voice.

On Dec. 4, 1955, 300 school board members from 128 districts adopted the OSBA Constitution, which stated that OSBA's chief purpose was to "work for the general advancement of public education in Ohio." The following year, 486 of the 1,246 local and county boards of education were OSBA members.

Today OSBA is composed of 718 school boards. Nearly 3,500 elected and appointed members represent Ohio's local, city, exempted village, career center and educational service center districts. The management teams of member boards also have access to all OSBA services.

OSBA has changed significantly over the years in response to the changing educational landscape. But it remains true to its responsibility to help you, the local school board member, do your job more effectively. We're guided by our mission to serve Ohio's public school board members and the diverse districts they represent through superior service, unwavering advocacy and creative solutions. And we stand ready to assist you in all areas of boardmanship.



WHAT WE DO

Serving as a board member can be challenging. It also can be one of the most fulfilling responsibilities you'll ever experience. OSBA has many member benefits to help you and your governance team lead your district.

Direct services

OSBA's highly skilled and experienced staff provide free services supported by your dues, along with fee-based services. They include:

School board governance solutions

Consultations: School board services staff members are just a phone call away, ready to answer your boardmanship questions. Consultants also are available for free one-hour on-site consultations.

Strategic planning: Consultants help school districts prepare for the future. They can design and customize planning to meet individual district needs, guide districts through phases of their plans, serve as resource consultants and assist with annual reviews and updates.

Board-superintendent and board-treasurer relations

A strong connection among the board, superintendent and treasurer is a critical component of good governance. OSBA offers several fee-based services to help establish and nuture that relationship, including:

Superintendent and treasurer evaluations: Consultants provide initial training and oversight to assist boards in developing the evaluation process. They also will provide sample instruments to measure both leadership skills and progress toward goals and objectives. Consultants train boards in the process so they can carry out this legal responsibility.

Superintendent and treasurer searches: Consultants assist boards in the search process. The service includes processing applications; providing complete, confidential administrative support; making interview appointments; facilitating input sessions with stakeholders and the community; and critiquing board interview techniques. OSBA's scope in this area is national.

Communication/community engagement services

Board members continually deal with the public and the media. OSBA can help with community relations. Consultants provide information on working with

citizen committees, and they assist boards with creating school marketing and public information plans.

OSBA offers tips on organizing and promoting a bond-referendum campaign; establishing comprehensive time lines; providing suggestions on public engagement; identifying key communicators; facilitating public forums; and developing public information techniques to effectively communicate the board's message.

Levy campaign assistance: OSBA can assist your levy campaign by providing information and education through your local media.

Media relations: OSBA is the voice of local school boards in the statewide media. OSBA staff regularly respond to inquiries from the media on public education issues. In addition, we provide the media with news releases, informational pieces and position papers to promote OSBA positions. Ohio Education NewsClips, a roundup of education related press coverage, is published daily at www.ohioschoolboards.org/osba-newsclips.

Consultation services

OSBA provides consultation in all areas of school board responsibility. Staff work directly with boards on issues that have an impact on their operations.

Consultants provide on-site assistance in all areas relating to school district governance. Labor relations, legal, school security and policy staff provide consultation services in their respective subject areas. Call an OSBA staff member for help in these and other related areas.

Labor relations services

A school board's ability to provide sound educational programs is directly affected by its collective bargaining agreements. The obligation to negotiate with the union over terms and conditions of employment and to administer the labor agreement affects a board's ability to govern the district efficiently and effectively. Because of the impact of collective bargaining on the educational process, OSBA offers the following labor relations services to boards:

Arbitration referral service: Members can send OSBA a list of arbitrators and staff will provide guidance as to which arbitrators to select and which to avoid. This free service includes insight into an arbitrator's past decisions, as well as feedback and rankings from other state associations.

Contract analysis: Staff can analyze a district's negotiated agreement and identify provisions that are beneficial to the board and protective of the district's interests. This analysis also identifies ill-advised clauses that could adversely affect district operations, as well as clauses that are non-negotiable because they are inconsistent with the law.

Employee handbook service: OSBA consultants can help members create a concise and accurate handbook that is useful for employers and employees.

In-district assistance: Staff will provide in-district consultations for the following: analysis of the district's collective bargaining agreements; analysis and advice on board and union proposals; assistance in planning bargaining strategy; preparation for mediation and fact finding; contract administration and grievance handling; advice on collaborative bargaining; and assistance in other specialized areas.

Salary schedule analysis: Staff will review a district's salary schedule and run a salary proposal simulator to help districts identify the full impact of personnel costs and the effect that a change in the base salary, index, training columns or additional years of experience can make.

Strike assistance: Staff assist boards that are anticipating or experiencing job actions or strikes. Assistance may include meeting with the board to develop effective strategies; developing sample contingency plans, pleadings and policies; and assisting with public relations.

Policy services

Policymaking is your board's primary responsibility. OSBA provides services to help you formulate or revise policy; ensure that it is compliant with federal and state laws and codes; and that it is disseminated to the public. OSBA's policy services include:

Policy audit: Staff will review your district's policy manual and provide you with a narrative of their findings. Sample policies and regulations will be provided. On-site consultations are included.

Policy clearinghouse: OSBA maintains an extensive policy collection submitted by its members. Staff can provide you with sample policies, regulations and exhibits from other districts in Ohio.

Policy manual development and writing: Policy staff can analyze your existing manual and update it to comply with federal and state statutes and codes. This may include writing, revising and deleting existing policies. OSBA has three levels of service to meet your district's needs.

Policy manual updating: Policy staff can review and edit a district's policy changes and enter them into its current manual.

Web-based policy manual publishing: Policy staff can assist boards with publishing their policy manuals on the Internet. Web-based manuals are electronically linked to relevant statutes and codes, and are continually updated.

School law services

Each day, OSBA attorneys provide legal information to members. This service is available free to all member districts. Attorneys field inquiries on a number of issues, including board member ethics and conflict of interest; student rights; tenure and seniority; budget and finance; school elections; public contracts; and Ohio's Open Public Meetings and Open Public Records acts.

Districts also can join the OSBA Legal Assistance Fund (LAF), a trust fund that helps school districts involved in legal cases that are of statewide significance to all boards of education. Members of LAF may receive direct financial or legal assistance paid for by LAF.

Transportation services

Student transportation is a tremendous responsibility for boards of education. It not only involves buses and drivers, but careful planning and an awareness of a multitude of laws, rules and regulations. To help districts improve the effectiveness of their student transportation systems, OSBA provides the following transportation consulting services to members:

- board member in-service presentations;
- driver training seminars;
- administrative training seminars;
- routing efficiency audits;
- assistance with legislated procedures including payments in lieu of transportation;
- driver qualifications assurance studies;
- emergency plan development;
- general transportation consulting and assistance.

Endorsed programs

OSBA selectively endorses outside providers to deliver products and services necessary to effectively manage schools. These programs provide a unique benefit to our members at a special value.

All OSBA members are entitled to *free* business travel/accidental death and dismemberment insurance, courtesy of OSBA. To learn more about this program, visit www.ohioschoolboards.org.

Other endorsed programs, available as a fee-based service, include:

- District financial forecasting Public Finance Resources Inc. provides information, resources and training on vital school district financial issues.
- Electronic governance solution BoardDocs lets district immediately publish and revise agendas, policies and procedures via the Internet.
- Electricity purchasing Power4Schools offers your district the best price on electricity with 24/7 management and a guaranteed strike price.
- Life, accident and long-term disability insurance The OSBA Insurance Agency LLC provides free business travel accidental death and dismemberment (AD&D) coverage in the amount of \$100,000 to school board members. Board members also may purchase 24/7 personal AD&D for themselves and their dependents at low group rates. Distict administrators can purchase low-cost business travel and personal AD&D coverage for themselves and their families.
- National School Boards Association National Connections Program gives districts the tools and information they need to champion student achievement in their local communities from a federal perspective.

- Online payment program PayForIt is a secure online payment program that simplifies payment, collection and balancing of school funds.
- Online purchasing cooperative BuyBoard offers a competitive bidding process that allows districts to get volume discounts via Web-based shopping.
- Online safety compliance program PublicSchoolWORKS is a comprehensive, Web-based compliance program built specifically for public schools.
- Procurement card program PNC Financial Services Group's purchasing card creates efficiencies by simplifying the procurement and reconciliation process, reducing paperwork and administrative costs.
- Property, liability, fleet and violence coverage Ohio School Plan offers fleet, liability and property/casualty coverage, plus a unique plan that covers violence incidents.
- School safety and security software NaviGate Prepared offers schools a Webbased emergency preparedness system that works in conjunction with emergency and law enforcement personnel in a crisis situation.
- Treasurer, business manager and position bonds Hylant Administrative Services' surety and fidelity liability coverage for districts includes treasurer and superintendent position bonds.
- Workers' compensation, managed care organization, risk management, safety training and a group retro program The SchoolComp Safety Program offers districts representation and assistance with claims processing.

For a complete list of endorsed programs, visit www.ohioschoolboards.org/osba-endorsed-programs.

Information resources

OSBA keeps its members informed in print and online through a wide range of books, periodicals, online databases, electronic newsletters and research services.

The *Journal*, OSBA's flagship publication, covers association activities and features innovative articles and columns that will interest school board members and administrators. *Free to all members*

The *Briefcase* is OSBA's bimonthly education newsletter. It provides timely information on a variety of subjects on state, local and national levels related to school operations. A *Briefcase* subscription provides important information on board and legal issues; grants and funding; unique programs in school districts; legislative information; and other topics pertinent to schools.

The *Briefcase* newsletter is *free* if all subscribers in a district sign up to receive it electronically. Otherwise, the district rate is \$125.

School Management News is a monthly school management update designed to provide districts with the latest news affecting day-to-day school operations. Topics include labor relations, human resources, business, finance, arbitrations, negotiation settlements, State Employment Relations Board decisions, website reviews and relevant commentary. Subscription only

Policy Development Quarterly contains articles on new laws or rules, both state and federal, which have policy implications. Districts can designate up to 15 subscribers to receive this e-newsletter, published four times each year. Each issue includes a password to review the complete text of new or recently revised policies online. Subscription only

Communication Plus provides school communicators with public relations tips, ideas and articles on a wealth of topics. Also available electronically. Subscription only

OSBA website

OSBA's website is your electronic resource for education information 24 hours a day, 7 days a week, 365 days a year. Located at www.ohioschoolboards.org, the site provides education news; up-to-date information on policy, labor relations, legal and governmental relations issues; association program information; and other exclusive Web content. The site also features the Rapid Roundup, a brief news update on educational issues facing Ohio school districts.

OSBA publications

OSBA offers numerous publications geared toward board members. To order, visit www.ohioschoolboards.org/catalog. Titles include:

- Board President's Handbook
- Board Self-Evaluation Handbook
- Board-Legislature Partnership
- Board-Superintendent Partnership
- Board-Treasurer Partnership
- Boardmanship
- The Family and Medical Leave Act: A practical guide
- Labor Relations Primer
- The Ohio School Ethics Guide
- Ohio Sports Law Handbook
- Parliamentary Procedure at a Glance
- Special Education Law in Ohio
- Sunshine Law for Schools

OSBA plaques

OSBA's customized plaques and awards are the perfect way to recognize the friends of education in your school district. Visit www.ohioschoolboards.org/products/plaques to see examples of the plaques, or call (614) 540-4000 or (800) 589-OSBA to request a brochure or learn more.

OSBA brochures, fact sheets and Five Fast Facts

OSBA has many free brochures and fact sheets available. Members also can download "Five Fast Facts" sheets (www.ohioschoolboards.org/five-fast-facts), which include talking points on a variety of issues. Call (614) 540-4000 or (800) 589-OSBA to request these items.

Members also can download informative brochures and fact sheets from the website at www.ohioschoolboards.org/osba-publications, including:

- Board member compensation, benefits and expense reimbursement
- Competitive bidding
- Criminal records check
- District property disposal
- Educating adult students and emancipated minors
- Filling board of education vacancies
- Grandparents as caretakers
- How to create an education foundation
- Interstate compact: Educational opportunity for military children
- Misconduct reporting
- Ohio's Sunshine Law
- OSBA services catalog
- Regulating political activities of school employees
- Rehiring retirees
- School board organizational meeting and the oath of office
- School levy limitations
- School transportation regulations
- Social media and schools
- Supplemental contracts
- Understanding school levies
- Voting makes a difference
- What is OSBA?

Online databases

OSBA compiles information on a variety of critical topics and publishes the content in searchable online databases. All of the databases listed below can be accessed through OSBA's website at www.ohioschoolboards.org.

BillTracker: Receive up-to-the-minute information on critical legislation, along with background information and resources for taking immediate action.

District levy history: This database lists all the issues districts have placed on the ballot since 2003. The database gives you the ability to view your district's history, same-sized districts' success, the success of certain issues and much more.

Student achievement: This database contains information on outstanding programs found in Ohio's public schools. These programs — showcased over the years in the Student Achievement Fair at the OSBA Capital Conference and Trade Show— have had a significant impact on student achievement in their districts.

Superintendent/treasurer compensation: This database lists the salary information of Ohio superintendents and treasurers from the previous school year.

School board election campaign

OSBA seeks to raise the profile of boardmanship and encourage high-caliber

candidates to run for office. The association publishes a Board Candidate Kit as a guide for those seeking office. In addition, Board Candidate Workshops are held throughout the state to provide information about boardmanship and to answer questions from candidates.

Representation and advocacy

OSBA develops, communicates and advocates the perspective of school governance teams. To fulfill its mission of effective advocacy, staff represent boards of education before the state legislature, the State Board of Education, the governor's office, Congress and other state and federal agencies. Advocacy activities include:

State and federal lobbying: The association maintains a high profile at the state and federal levels. OSBA lobbyists attend General Assembly hearings, as well as all meetings of legislative committees that consider bills affecting education. In addition, they meet with state legislators regularly to advise them of association positions.

Education Tax Policy Institute: The legislative division also works with the Education Tax Policy Institute. The institute's mission is to research and analyze changes in taxes that affect funding for education and local services.

Legislative networking: OSBA provides opportunities for board members to network with federal and state government officials. These events inform the membership about pressing educational issues, offer effective lobbying techniques and provide an opportunity for face-to-face contact with elected officials.

Grassroots lobbying: Staff coordinate grassroots lobbying efforts to promote OSBA legislative goals and involve the public in achieving those goals.

In addition, OSBA publishes "Effective advocacy for school leaders", which serves as a guide to effective advocacy. The Legislative Directory and online BillTracker provide tools to contact elected officials and follow important education legislation.

Legislative analysis: Staff analyze pending legislation to assess its impact on public education. Information is shared with local boards through OSBA's weekly e-newsletter, *Facts in a Flash*.

Kids PAC: Members can contribute to OSBA's political action committee, helping to support lawmakers who believe in our goals. Raising money for *Kids* PAC helps OSBA support legislators who can help make a difference in public education. Join *Kids* PAC at http://kidspac.org.

Training

Whether you're a new board member or a seasoned veteran, there are always new leadership skills to explore. OSBA offers the following training

opportunities to help you reach your full potential as a board member:

Board Leadership Institute: OSBA's Board Leadership Institute is a two-day training event designed by and for board members. Courses cover a range of topics, including general boardmanship, governance, leadership, labor, policy and school law matters.

Board Presidents' Workshop: Learn skills essential to successfully lead your district.

New Board Member Academy: These two-day academies focus on the knowledge and skills new board members find essential to becoming effective contributors to their district's management team. Topics include the world of boardmanship; decision-making and working as a team; how Ohio schools are funded; the Sunshine Law and executive sessions; and many more.

OSBA Capital Conference and Trade Show: The OSBA Capital Conference, one of the nation's premier education conventions, offers exceptional opportunities for learning, sharing and networking. The four-day event offers general sessions, more than 100 breakout sessions and something for every member of your district's administrative team.

Other workshops: Below are just some of the workshops OSBA offers each year:

- Attendance, Tuition and Custody Law Workshop
- Cyberlaw Workshop
- ESC Workshop
- Management Development Series
- Master of Transportation Administrator Training Program
- School Finance Seminar
- School Law for Treasurers
- Special Education Workshop
- State Legislative Conference

Please review OSBA's website at www.ohioschoolboards.org/workshops for a complete listing.

ESC Academies: Many ESCs have contracted to host academies throughout the year, bringing experts to the ESC to train board members. Contact OSBA to learn more about the academies.

Individual board training: To help boards work effectively as a team, OSBA also offers customized workshops on a variety of topics, including:

- Board self-evaluations
- Goal setting
- Superintendent or treasurer evaluations

Web-based training: To make learning more convenient, OSBA offers a growing number of training programs through webinars. You can view some of OSBA's informational webinars at www.ohioschoolboards.org/osba-webinars. Up-coming webinars are included in the workshop listing at www.ohioschoolboards.org/workshops.



HOW WE'RE GOVERNED

OSBA is governed by a Board of Trustees and an Executive Committee. Along with the Delegate Assembly, the governance team is responsible for ensuring OSBA operates effectively and meets the needs of its members.

OSBA's governing bodies include:

Elected officers: The president, president-elect and immediate past president each serve one-year terms. The president-elect is elected at the Annual Business Meeting of the Delegate Assembly, held during the OSBA Capital Conference in November.

Delegate Assembly: Policies are established by the Delegate Assembly. Every school board has a voice in the Delegate Assembly — one board, one vote. Each selects a delegate. The Delegate Assembly determines the association's positions on educational issues, and sets the bylaws under which it operates. At the Annual Business Meeting of the OSBA Delegate Assembly, board representatives vote on resolutions submitted by school boards, the OSBA Board of Trustees and standing committees. Resolutions approved at the meeting become association policy and dictate what OSBA will fight for in the courts, in Columbus and in Washington, D.C. Delegates also elect the association's president-elect every year.

Board of Trustees: The Board of Trustees, the association's official governing body, is composed of the officers of the association, the presidents of the five regional associations, one representative each from the six districts in Ohio with the largest pupil enrollment, together with no fewer than 14 or more than 16 other persons. The executive director and regional managers serve as non-voting members.

The Board of Trustees supervises association affairs, adopts the budget, reviews governance and operations policies and appoints the executive director.

Executive Committee: The association's Executive Committee consists of the president, president-elect, immediate past president and five other members, one appointed from each regional executive committee. Members of the Executive Committee serve as the governing body between Board of Trustees meetings.

Regional executive committees: The five regional committees determine policy for the region and plan programs and activities designed to carry out the purposes of the organization. Visit www.ohioschoolboards.org/Regions to learn how to become involved in regional activities.

Statewide committees: OSBA has several committees to meet the needs of the association and its members. Committees such as the Capital Conference Planning Task Force and Legislative Platform Committee provide direction for the association. Other committees, including the Urban School District Advisory Network, OSBA Black Caucus and Small School District Advisory Network, help similar districts find ways to solve unique problems. See a full listing of committees at www.ohioschoolboards.org/osba-groups.

Governing documents

The association is guided by a constitution and bylaws. The Legislative Platform states OSBA's positions on a variety of issues facing public education. The platform also guides the association's advocacy efforts.

These documents are available online at www.ohioschoolboards.org/who-we-are.

Strategic plan

With the release of "Visionary Initiatives for Strategic Action" (VISA), OSBA officially unveiled its strategic plan.

The VISA plan is the product of collaboration between association members and staff. Board-member driven, the plan is a living document designed to guide OSBA now and into the future as it works to support Ohio's public school boards in the 21st century.

With its strategic plan, OSBA is positioned as the forward-looking voice of public education in supporting its mission of providing the best service possible for Ohio's public school boards, now, and long into the future.

To learn more about the plan, visit www.ohioschoolboards.org/VISA.





HOW TO GET INVOLVED

One of the most important aspects of OSBA membership is active participation in the school board community. Take advantage of the many opportunities OSBA has to offer. Get involved in setting the direction of the association and of Ohio's public schools.

Participate in advocacy events: Get involved in OSBA's lobbying efforts by participating in ongoing statewide legislative advocacy activities. This is your opportunity to speak face-to-face with state and federal government officials. For more details on these events, contact OSBA's legislative division.

Visit BillTracker at www.ohioschoolboards.org to receive up-to-the-minute information on critical legislation, along with background information and resources for taking immediate action.

Serve on a committee: Share your time and expertise by serving on a regional or statewide committee. Interested board members may contact their regional manager or OSBA for consideration.

Participate in the Delegate Assembly: Delegates are integral members of the policymaking body of OSBA. Each board selects one delegate to serve in the Delegate Assembly. Local school boards typically select a delegate during their annual organizational meeting.

Participate in training: Learning is an ongoing process. Expand your skill set by attending statewide and regional workshops and conferences throughout the year. Contact OSBA if you would like to schedule a customized workshop for your school board.

Attend the Capital Conference: OSBA's Capital Conference and Trade Show is the best place to receive up-to-the-minute information and learn critical new skills to help you effectively lead your district. National, state and local speakers shed light on innovative new ideas to help improve your schools. More than 600 vendors showcase new products and services on the exhibition floor. Numerous opportunities are available for you to network with colleagues.



CODE OF ETHICS

A guide for school board members

While serving as a member of my board of education, I will accept the responsibility to improve education. To that end I will:

- Remember that my first and greatest concern must be the educational welfare of all students attending the public schools;
- Obey the laws of Ohio and the United States;
- Respect the confidentiality of privileged information;
- Recognize that as an individual board member I have no authority to speak or act for the board;
- Work with other members to establish effective board policies;
- Delegate authority for the administration of the schools to the superintendent and staff;
- Encourage ongoing communications among board members, the board, students, staff and the community;
- Render all decisions based on the available facts and my independent judgment rather than succumbing to the influence of individuals or special interest groups;
- Make every effort to attend all board meetings;
- Become informed concerning the issues to be considered at each meeting;
- Improve my boardmanship by studying educational issues and by participating in in-service programs;
- Support the employment of staff members based on qualifications and not as a result of influence;
- Cooperate with other board members and administrators to establish a system of regular and impartial evaluations of all staff;
- Avoid conflicts of interest or the appearance thereof;
- Refrain from using my board position for benefit of myself, family members or business associates;
- Express my personal opinions, but once the board has acted, accept the will of the majority.

Adopted by the OSBA Delegate Assembly, Nov. 11, 1991.



CONTACT OSBA

