

Sunol Glen Unified School District

Board Member

Handbook

Sunol Glen Unified School District

CODE OF ETHICS FOR BOARD MEMBERS - Norms of Governance and Behavior

As members of the Sunol Glen Unified School District Board of Education I will strive to improve public education, and to that end I will:

- Remember always that my first and greatest concern must be the educational welfare of all the students attending Sunol Glen. I will govern on behalf of the students. Staff, parents and public perceptions are absolutely important concerns but are subordinate to student achievement and welfare;
- Attend all regularly scheduled board meetings and other meetings, insofar as possible, and become informed concerning the issues to be considered at those meetings;
- Respect each other’s opinion and be willing to compromise. Focus on process, not personalities;
- Recognize that I should endeavor to make policy decisions only after full discussion at publicly held board meetings;
- Support the Board’s role and function which is to govern and set policy, not to manage staff.
- Parent and Community concerns need to be first and foremost referred back to the school. Sunol Glen is unique in that board members may very likely be parents of students attending our school. Remember to keep these roles separate by observing these norms of behavior.
- Render all decisions based on the available facts and my independent judgment, and refuse to surrender that judgment to individuals or special interest groups;
- Encourage the free expression of opinions by all board members, and seek systematic communications between the board and the public;
- Work with other board members to establish effective board policies and to delegate authority for the administration of the policies to the superintendent;
- Communicate to other board members and the superintendent expressions of member and public reaction to board resolutions, policies and programs;
- Inform myself about current educational issues by individual study and through participation in programs providing needed information, such as those sponsored by my state and national school boards association namely Orientation for New Board Members;
- Support the employment of those persons best qualified to serve as staff, and insist on a regular and impartial evaluation of all staff;
- Avoid being placed in a position of conflict of interest, and refrain from using my board position for personal and partisan gain;
- Take no private action that will compromise the board or administration, and respect the confidentiality of information that is privileged under applicable law;

My signature below (using the single district form) indicates that I have read and agree to abide by this Sunol Glen Unified School District Code of Ethics for Board Members - Norms of Governance and Behavior:

Signature: _____ Date: _____

Signature: _____ Date: _____

Signature: _____ Date: _____

Sunol Glen Unified School District

The Role of the Board

(rev. 4.10.16)

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Instructions

1. This document is implemented every two years in conjunction with the biennial seating of new board members in December and the last board meeting of the school year.
2. Procedure:
 - a. After the administration of the Oath of Office to new board member(s), each new board member shall be given a binder containing a copy of "The Brown Act: School Boards and Open Meeting Laws" (CSBA) and "SGUSD Governance Topics: Excerpts from The First 60 Days of School Board Service" (The Master Teacher) including the SGUSD Organizational Chart. Both of these documents are to be read prior to the next board meeting. These binders may be kept by the members.
 - b. At this same meeting, EACH board member shall be provided this document, "Sunol Glen Unified School District - The Role of the Board."
 - c. At the January meeting, the Board members shall execute a single copy of the Code of Ethics which will be given to the Superintendent to copy and return to each of the board members' book.
 - d. The board shall perform its self-evaluation at the end of the school year where board deficiencies become board goals for the following two years.
 - e. As secretary for the board, the Superintendent shall maintain the Code of Ethics and Survey form after they have been executed.

General Guidelines

Based on CSBA Professional Governance Standards

THE BOARD:

School districts and county offices of education are governed by boards, not by individual trustees. While understanding their separate roles, the board and superintendent work together as a "governance team." This team assumes collective responsibility for building unity and creating a positive organizational culture in order to govern effectively.

To OPERATE EFFECTIVELY, THE BOARD MUST HAVE A UNITY OF PURPOSE AND:

1. Keep the district focused on learning and achievement for all students.

- Recognize that children come to school with diverse educational needs.
- Base decisions on the district's vision, student needs, research, empirical data and a balance of community expectations, legal constraints and resources.
- Ensure that the district has established academic standards and regularly measures growth in achievement for all students.
- Ensure that the district provides opportunities for all students to succeed.

2. Communicate a common vision.

- Develop and adopt a written statement of the district vision and other direction-setting documents using collaborative processes that involve the staff and community.
- Ensure that procedures are in place to periodically review the district vision and other direction-setting documents.
- Demonstrate commitment to the vision and goals by regularly communicating them to staff and the community.
- Exhibit behaviors and make decisions that support achievement of the district vision.
- Keep current on trends and emerging needs in education in order to proactively participate in renewing or reviewing the district's direction and policies.
- Support board decisions.
- Speak with a common voice.

3. Operate openly, with trust and integrity.

- Conduct district business in a fair, respectful and responsible manner.
- Consider the concerns and interests of the staff and community.
- Encourage thorough debate, seek to engage in dialogue for clarification and withhold judgment until all perspectives are heard.
- Ensure that all members of the board have the same information — no secrets or surprises among members of the governance team.
- Clearly communicate decisions to all those who are affected by them.
- Keep confidential information confidential.

4. Govern in a dignified and professional manner, treating everyone with civility and respect.

- Treat the superintendent, staff, students, parents and community with dignity and respect.
- Listen openly and respectfully to each other, to staff, students, parents and members of the community.
- Welcome open discussion of different points of view.
- Demonstrate ability to disagree on issues and still maintain trust, respect and dignity.
- Work together to build consensus for decisions.

- 5. Govern within board-adopted policies and procedures.**
 - Have a policy development, approval and update process in place that is understood and followed.
 - Understand the distinctions between the role of the board and that of the superintendent and staff and do not become involved in the day-to-day operations of the district.
 - Have agreed-upon norms and protocols to carry out board responsibilities.
- 6. Take collective responsibility for the board's performance.**
 - Assume collective responsibility for board conduct, behavior and conflict management.
 - Function as a governance team with the superintendent.
 - Demonstrate a commitment to continually improving governance efforts.
 - Take responsibility for the orientation of all new members.
- 7. Periodically evaluate its own effectiveness.**
 - Have procedures in place for regular, on-going self-evaluation.
 - Ensure meeting agendas provide for a sound order of business and facilitate maximum focus on matters related to student achievement.
 - Have norms and protocols in place to ensure that individual board members do not get involved in the day-to-day management of the district.
- 8. Ensure opportunities for the diverse range of views in the community to inform board deliberations.**
 - Ensure board policy enables parents, staff and the public to participate in district discussions, school programs and activities in meaningful ways.
 - Consider the concerns and interests of all segments of the community in deliberations.

THE BOARD'S JOBS

The primary responsibilities of the board are to set a direction for the district, provide a structure by establishing policies, provide support, ensure accountability and provide community leadership on behalf of the district and public education. To fulfill these responsibilities, there are a number of specific jobs that effective boards must carry out. These standards highlight some of the most important ones.

EFFECTIVE BOARDS:

- 1. Involve the community, parents, students and staff in developing a common vision for the district focused on student learning and achievement and responsive to the needs of all students.**
 - Develop and adopt the district vision and other direction-setting documents using collaborative processes that involve the staff and community.
 - Ensure that inclusive processes are in place to periodically review the district vision and other direction-setting documents.
 - See that the district vision and goals are clearly communicated to students, parents, staff and the community.
 - Base all decisions on the district's vision, student needs, research, empirical data and a balance of community expectations, legal constraints and resources.
 - Engage in annual planning and regularly review progress toward achievement of the vision and goals.

- 2. Adopt, evaluate and update policies consistent with the law and the district's vision and goals.**
 - Have a working knowledge of district policies.
 - Establish a clear, understandable process for adopting, updating and communicating district policies.
 - Ensure policies reflect the needs, wishes and desires of the community.
 - Recognize it is the board's role to adopt policies and the superintendent's role to implement them and report back to the board as necessary.
 - Follow a regular schedule for reviewing and updating policies as necessary due to new mandates by law, contract negotiations, emerging community issues or other circumstances.
- 3. Maintain accountability for student learning by adopting the district curriculum and monitoring student progress.**
 - Engage the staff and community in order to set the direction for district curriculum.
 - Articulate the district's goals for student achievement.
 - Recognize the connection between the implementation of an effective curriculum and the acquisition and allocation of resources.
 - Provide time to staff for program development, implementation and professional growth.
 - Ensure that the district maintains reliable internal assessment data to use in making decisions.
 - Utilize reliable assessment data to adopt and update policies for curriculum, instruction and assessment in alignment with state requirements and local needs.
 - Establish regular reviews of student performance data and empower the superintendent and staff to monitor performance and develop new strategies.
 - Regularly report to the community on student performance.
- 4. Hire and support the superintendent so that the vision, goals and policies of the district can be implemented.**
 - Establish selection criteria for a new superintendent based on the district vision and goals.
 - Value a long-term relationship between the board and superintendent and conduct all contractual negotiations in a professional manner.
 - Understand that the superintendent is the board's administrative link to the district.
- 5. Conduct regular and timely evaluations of the superintendent based on the vision, goals and performance of the district, and ensure that the superintendent holds district personnel accountable.**
 - Ensure that the district evaluation system holds all staff responsible for improving student achievement.
 - Collaborate in setting goals and priorities as the basis for the superintendent's annual evaluation.
 - Ensure that the evaluation process supports the professional growth of the superintendent and the continuous improvement of the district.
 - Ensure that the evaluation process provides opportunities to take timely corrective action to avoid major disagreements between the board and superintendent.
 - Utilize a clearly defined, ongoing and interactive evaluation process that results in written documentation and is consistent with legal and contractual requirements.
 - Have policies and procedures in place for personnel accountability that are consistent with legal requirements and provide for due process.
 - Perform a judicial role in personnel issues, not an investigative role.
 - Have policies and procedures in place for recognizing outstanding performance by employees.

- 6. Adopt a fiscally responsible budget based on the district's vision and goals, and regularly monitor the fiscal health of the district.**
- Adopt guidelines, policies and procedures for developing the budget that ensure sound financial processes.
 - Recognize that the superintendent and staff develop the budget, the board adopts the budget, and the superintendent and staff implement the budget.
 - Understand that budget assumptions may change throughout the year.
 - Weigh the financial impact of possible changes to the vision and goals against existing programs.
 - Ensure that state, federal and other fiscal issues that impact the budget are monitored and addressed.
 - Monitor the external auditing process and ensure that audit recommendations are addressed.
 - Require that the budget be presented in an understandable and useful format.
 - See that the budget is utilized as a policy document to enhance student achievement and implement the priorities of the district.
 - Establish a process to regularly inform the community about the financial health of the district.
- 7. Ensure that a safe and appropriate educational environment is provided to all students.**
- Adopt, update and monitor policies pertaining to safety and cleanliness of facilities.
 - Support a long-range facility management and funding plan that reflects the vision and goals of the district.
 - Advocate at the local, state and federal levels for appropriate funding for school facilities.
 - Seek and consider alternative funding sources for facilities (such as bond elections, public-private partnerships or other types of financial instruments and agreements).
- 8. Establish a framework for the district's collective bargaining process and adopt responsible agreements.**
- Set parameters for collective bargaining that are linked to the vision and priorities of the district.
 - Recognize that collective bargaining is an ongoing process, not an isolated activity.
 - Support the role of the superintendent to manage the negotiations process: analyzing contract proposals, recommending changes to the contract, keeping the board informed about the progress of negotiations and administering the contract.
 - Support the position of the district throughout the negotiation process.
 - Adhere to legal, ethical, confidential and contractual requirements of collective bargaining.
 - Consider the immediate and long-term fiscal, program and personnel impacts of negotiations before adopting the collective bargaining agreement.
- 9. Provide community leadership on educational issues and advocate on behalf of students and public education at the local, state and federal levels.**
- Ensure that effective methods are used to gather information and encourage involvement from the entire community.
 - Adopt a communications plan, which includes a system to report student achievement.
 - Have a working knowledge of the district's programs and build support for them among the public, community organizations and local agencies.
 - Communicate with local, state and federal policymakers about matters pertaining to student achievement, district programs and public education.

DETERMINING THE BOARD'S GOVERNANCE GOALS

Abiding by the agreed-upon Code of Ethics for Board Members - Norms of Governance and Behavior, the board should have a discussion about individual responses to Sections A and B of the Board Self-Evaluation Survey. The discussion should focus on areas where the board agrees a standard is not being met or where board members have significantly different opinions about whether a standard is being met (e.g., some members responding "we do this always," others saying the board "does this rarely" or "not at all.")

The purpose of the discussion is to identify why the board is not meeting the standard and/or why there is such a wide range of opinions about whether a standard is being met, and to develop ways to improve. Answering the following questions can help direct the conversation.

- Can we come to agreement on what this standard means to us?
- What would it look like if we were meeting this standard? What would we be doing?
- How would others know we are meeting the standard?
- Do we need to create any norms or protocols to help us attain the standard?
- How and when will we measure improvement or successful attainment of the standard?

As a result of the discussion, the board should come to agreement on two to three Standards or Success Indicators from Sections A and/or B of the Board Self-Evaluation Survey that will become the board's Governance Goals during the next year.

SECTION 3 THE INDIVIDUAL TRUSTEE

The Professional Governance Standards for individual trustees are listed below. When they were originally adopted, members of the CSBA Delegate Assembly and Board of Directors discussed what the standards would look like in action. They asked themselves, "What would I be doing if I were meeting this standard?" The results of those discussions are listed as "success indicators" under each standard. As governance team members measure their own accomplishments, it may be helpful to refer to these indicators.

It's vital to understand that this portion of the self-evaluation is a personal self-reflection, not a judgment of others.

Individuals should record their assessments on the separate "School Board Self-Evaluation Survey, Section C — The Individual Trustee".

THE INDIVIDUAL TRUSTEE:

In California's education system, a trustee is a person elected or appointed to serve on a school district or county board of education. Individual trustees bring unique skills, values and beliefs to their board. In order to govern effectively, individual trustees must work with each other and the superintendent to ensure that a high quality education is provided to each student.

To BE EFFECTIVE, AN INDIVIDUAL TRUSTEE:

- 1. Keeps learning and achievement for all students as the primary focus.**
 - Recognizes that children come to school with diverse educational needs.
 - Seeks to build consensus for decisions based on the district's vision, student needs, research, empirical data and a balance of community expectations, legal constraints and resources.
- 2. Values, supports and advocates for public education.**
 - Actively supports the district's educational programs.
 - Helps create a supportive climate of excellence for the staff.
 - Seeks to build community support for the district's programs.
 - Actively supports public education.
- 3. Recognizes and respects differences of perspective and style on the board and among staff, students, parents and the community.**
 - Honors each individual's right to express an opinion.
 - Is able to disagree on issues and still maintain respect and trust.
 - Listens respectfully to other members of the team, and to staff, students, parents and the community.
 - Seeks to engage in dialogue for clarification and withholds judgment until all perspectives are considered.
- 4. Acts with dignity, and understands the implications of demeanor and behavior.**
 - Performs responsibilities in a manner that reflects service to the community on behalf of students.
 - Listens to other members of the team and strives to maintain trust.
 - Demonstrates a commitment to continually improving teamwork and problem-solving skills.
 - Shares important information with other members of the team.
- 5. Keeps confidential matters confidential.**
 - Does not discuss or distribute information about confidential matters outside of closed session.
 - Understands the legal requirements for confidentiality.
- 6. Participates in professional development and commits the time and energy necessary to be an informed and effective leader.**
 - Regularly attends meetings, having read the agenda and background materials in advance, and comes prepared to discuss agenda items.
 - Visits schools and attends school functions in accordance with board protocol.
 - Has a working knowledge of the district's programs, goals and policies.
 - Is familiar with general education trends and issues as well as the overall state and federal educational system.
 - Participates in continuing education and professional development activities and shares knowledge gained with board members, staff, parents and the community as appropriate.
- 7. Understands the distinctions between board and staff roles, and refrains from performing management functions that are the responsibility of the superintendent and staff.**
 - Clearly understand the roles and responsibilities of board members, the superintendent and the governance team.
 - Uses performance of governance responsibilities to impact district efforts.
 - Understands that the superintendent is the board's primary link with the district staff.
 - Does not become involved with day-to-day management or operations of the district.

- 8. Understands that authority rests with the board as a whole and not with individuals.**
- Strives to build consensus for decisions.
 - Recognizes that the board, not individuals, takes action and gives direction, and only at properly called board meetings.
 - Promotes district priorities, not a personal agenda.
 - Supports decisions of the board.

Survey - Board Self Evaluation

THE BOARD

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THE BOARD'S JOBS

**The primary responsibilities of the board are to set a direction for the district, provide a structure by establishing policies, provide support, ensure accountability and provide community leadership on behalf of the district and public education. To fulfill these responsibilities, there are a number of specific jobs that effective boards must carry out.

THE BOARD'S GOVERNANCE GOALS

***Based on the board's discussion of team member responses to The Board and The Board's jobs sections of the self-evaluation survey, choose two to three standards the board agrees to focus on for governance growth over the next year.

THE INDIVIDUAL TRUSTEE

****In California's education system, a trustee is a person elected or appointed to serve on a school district or county board of education. Individual trustees bring unique skills, values and beliefs to their board. In order to govern effectively, individual trustees must work with each other and the superintendent to ensure that a high quality education is provided to each student.

Section	Governance Standard	Always	Often	Rarely	Never	Unsure	Comment
A	*The Board - unity of purpose						
A1	Keep the district focused on learning and achievement for all students.						
A2	Communicate a common vision.						
A3	Operate openly, with trust and integrity						
A4	Govern in a dignified and professional manner, treating everyone with civility and respect.						
A5	Govern within board-adopted policies and procedures.						
A6	Take collective responsibility for the board's performance.						
A7	Periodically evaluate its own effectiveness.						
A8	Ensure opportunities for the diverse range of views in the community to inform board deliberations.						
B	**The Board's Job - Effectiveness						
B1	Involve the community, parents, students and staff in developing a common vision for the district focused on student learning and achievement and responsive to the needs of all students						
B2	Adopt, evaluate and update policies consistent with the law and the district's vision and goals.						
B3	Maintain accountability for student learning by adopting the district curriculum and monitoring student progress.						
B4	Hire and support the superintendent so that the vision, goals and policies of the district can be implemented.						

B	**The Board's Job – Effectiveness (cont.)						
B5	Conduct regular and timely evaluations of the superintendent based on the vision, goals and performance of the district, and ensure that the superintendent holds district personnel accountable.						
B6	Adopt a fiscally responsible budget based on the district's vision and goals, and regularly monitor the fiscal health of the district.						
B7	Ensure that a safe and appropriate educational environment is provided to all students.						
B8	Establish a framework for the district's collective bargaining process and adopt responsible agreements.						
B9	Provide community leadership on educational issues and advocate on behalf of students and public education at the local, state and federal levels.						

C	***The Board's Governance Goals						
C1	Goal 1:	comment:					
C2	Goal 2:	comment:					
C3	Goal 3:	comment:					

D	****The Individual Trustee						
D1	I keep learning and achievement for all students as the primary focus.						
D2	I value, support and advocate for public education.						

D	**** The Individual Trustee (Cont.)						
D3	I recognize and respect differences of perspective and style on the board and among staff, students, parents and the community.						
D4	I act with dignity, and understand the implications of demeanor and behavior.						
D5	I keep confidential matters confidential.						
D6	I participate in professional development and commit the time and energy necessary to be an informed and effective leader.						
D7	I understand the distinctions between board and staff roles, and refrain from performing management functions that are the responsibility of the superintendent and staff.						
D8	I understand that authority rests with the board as a whole and not with me.						

SGUSD Governance Discussion Topics
Excerpts from the First 60 Days of School Board
Service (pub. The Master Teacher)
Rev 4.10.16

Introduction:

The state has promised a free education to all and to that end, the school board member is a local surrogate for the state in this endeavor. It is the school members' duty to see the value of education and to help others understand this even though political and social preoccupations may cause the population to lose sight of this vision. The guidelines that follow should form the basis for the school board members' commitment to make this vision a reality. Dedicated school board members place the student *foremost* in all of their decisions and strive to prevent personal biases from interfering with teaching and learning. However these decisions will be *tempered* with the needs of other stake holders. Responsible stewardship includes using human and financial resources efficiently and periodically evaluating the board's work and recommitting itself to the ideals of schools at appropriate occasions.

Source: The Board, a program of inservice for school board members published by The MASTER Teacher, Inc.

1. Six Guidelines for Responsible Board Service
 1. **A board exists to give counsel, make judgments and oversee the commitment and use of resources available to the school.** Activities that go beyond this impinge on the management of the school administration as, a Board of Education does not manage the school.
 2. **The board hires, evaluates and if necessary, replaces the Superintendent/Principal.** It is the boards' purpose to offer constructive criticism and to support the superintendent/principal and not to find fault.
 3. **The board does not manage the school – it governs the school as policy maker.** It is the responsibility of the superintendent to carry out board policies and school management.
 4. **The Board ensures long-term survival of the school** in the face of social, economic, political and historical forces by analyzing their impacts on the school and maintains its viability in the face of these challenges.
 5. **The board exists to represent the state and act in the public interest.** Its easy to be lulled into acting in the interest of articulate and forceful individuals at the expense of the public interest. Restated: The board acts to maximize the educational value of the school for all students.
 6. **The board sets policy, goals and direction** and does not set strategy which is the responsibility of a qualified, trained and certified school administration. The board must be free to evaluate alternatives which cannot be done if personal agendas are allowed to determine strategy. Additionally, board members must not lock themselves into a business-industrial management style because the board responsibilities go well beyond this. Again, the board's function is to govern and not to manage. The wise board member helps the others to understand this and the guidelines above.

2. **Representing the interests of the state.**
 1. It is state law that school boards represent the interests that the state has in education of the young. This may be a difficult concept for board members to accept but each board is responsible to the state for its actions.
 2. State interests are:
 1. basis of educational programs must meet certain *minimum requirements*.
 2. Training and certification of school personnel
 3. Ensure the long term survival of the school system.
 4. State requirements have recently been joined by various federal requirements which must also be adopted as board policy. These are not requests but demands placed on the board.
 5. Additionally, the board is concerned with interests of the community, parents, public and students attending the school such that it results in a viable educational program.

3. **Six Precepts for School governance. (Taken from Council for Basic Education)**
 1. **The board's main purpose is to provide children with the skills, knowledge, and understanding to live productive and meaningful lives.** If the board doesn't focus on children, it has abandoned that purpose. Students must benefit from board decisions.
 2. **Communicate!** It is the board's responsibility to encourage involvement by employees, students and citizens and to find ways for this to occur through informing these stakeholders through formal consistent means.
 3. **Remember that boys and girls are not adults.** It is the goal of schools to help them achieve adulthood.
 4. **Our success stories may well be models for other institutions.** However, successes in other schools may not translate into success at our school because of our size and uniqueness.
 5. **For the best chance at success for the school, hire the best superintendent/principal and then support and encourage that person through advocacy and training.**
 6. **To secure improvement in the school, start with what is there and build upon that foundation.** Seek improvement at all times without radical changes due to disappointment. The six precepts should assist board members in making decisions.

4. The board and the democratic process: Every board to be a working model of democracy so that it serves as an example to students, teachers, administrators and the public. Keeping these in mind:
 1. **The democratic process is notoriously slow.** Many viewpoints must be heard and weighed.
 2. **The democratic process is noisy** as many clamor to be heard and wish to influence the board. Try to maintain an atmosphere of calm and reason.
 3. **Conflict is part of the democratic process.** No doubt many complaints and criticisms are designed to get the board to change its decisions. Do not be intimidated and learn to be comfortable so that the decision making process is not obscured.
 4. **People (including board members) make mistakes.** If the mistakes don't violate laws or mores, give folks a second chance.

5. **The board must evaluate its performance** generally in terms of these rules and precepts. The board's performance will very likely be evaluated by others which may not be complimentary and unfair.

5. **Choose to be a team player**

1. The whole is greater than sum of its parts.
2. Don't fall into the habit of new members vs. old members, us against them, board members vs board members, board vs. administrators, vs. teachers, vs the public. This makes it very difficult to collaborate with these groups later.
3. From time to time, boards must say no to groups that may view the board as the enemy later on. Behave in a way that rises above selfishness. This is not only the hallmark of leadership but keeps the focus on the mission. Help others to see this and try to draw people together through collaboration.
4. People must know where the board is going so completely spell out steps so that folks know that the vision is attainable and that progress is being made through allocation of human and financial resources. If risks have to be taken, they are taken collectively. When a goal is achieved through collaboration, there is a communal sense of accomplishment which is its own reward.

6. **A code for board member behavior**

1. Serve your apprenticeship. There is a lot to learn regardless of your opinion of your governing skills. Do this by listening, observing and asking questions of the other members. Understand how members react with each other. There will be problems later if we believe we are going to teach rather than learn during this period.
2. Participate in board deliberations. Do not relinquish the requirement for the collective wisdom to your colleagues. Attend meetings and make meaningful contributions.
3. Support the Superintendent/Principal (after all they were hired by the board). When the Superintendent/Principal is successful, the board looks good. If the Superintendent/Principal fails, the board's governance is questioned. Distinguish between counseling and criticism of the Superintendent/Principal as counseling can provide the most positive results. Too much criticism means that either the Superintendent/Principal or the criticizing board member should resign.
4. Keep your distance from subordinate administrators. Board members must not bypass the superintendent when seeking information or services. School system employees would love to have access to individual board members in order to influence or manipulate them:
 1. This violates the district's organizational structure
 2. This lessens the influence and authority of the superintendent/principal.
5. When conferring with the Superintendent/Principal, know the difference between counseling and influencing.
6. Do not discuss school personnel matters with others. Evaluation or discipline of students or staff is not matters for public discussion.

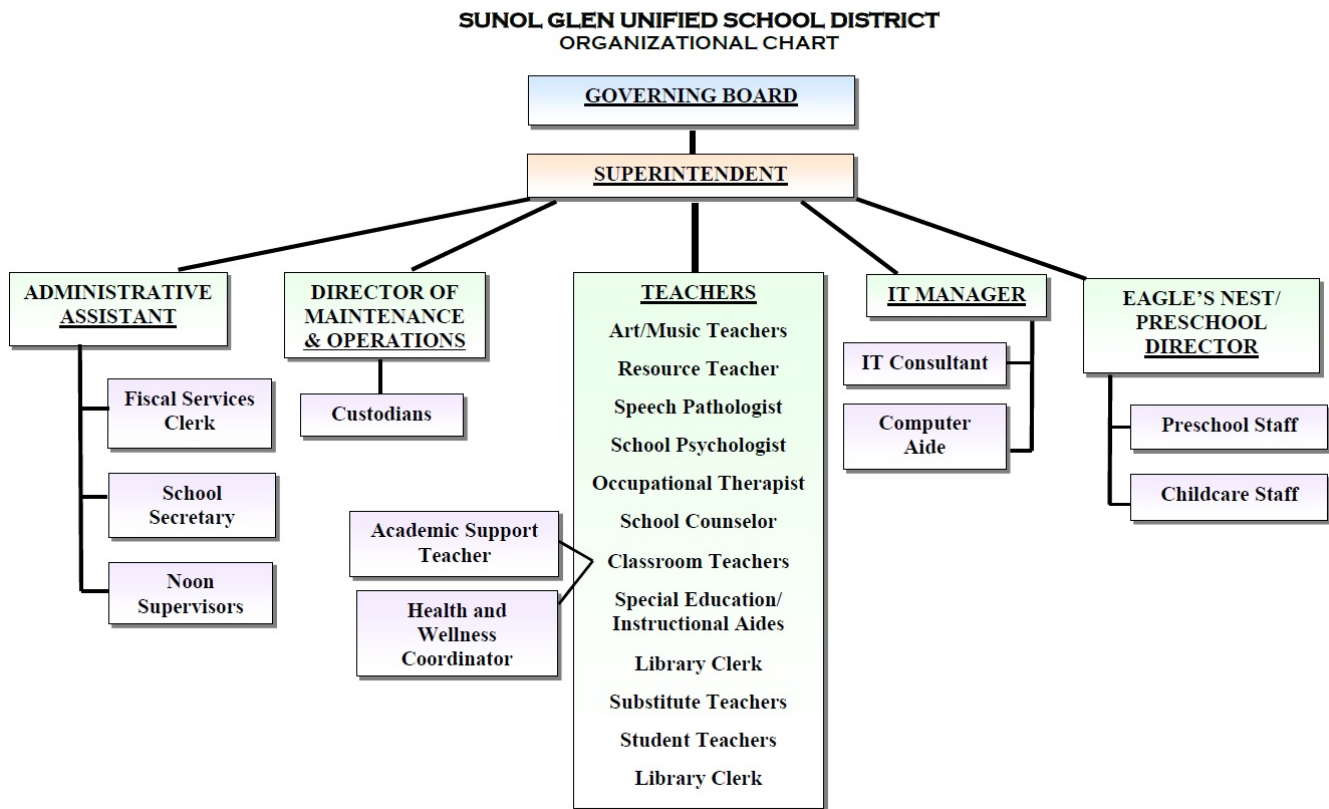
7. **Do you represent them all? (This can be challenging)**

1. Members must represent all constituents rather than special interest groups or agendas of a few people with whom they are acquainted. This results in actions that are not in the best public interest.

2. These problems are created when, in the member's *bid for election*, they seek support from a special group or develop a platform that reflects the agenda of a special group. Endorsements need to be gained by assuring voters that all would be represented equitably and fairly.
 3. It may seem necessary to have support of special interests but experience does not bear this out. Agendas, endorsements and attitudes about teacher salaries, working conditions, student discipline techniques, taxes, teacher concerns, special education, removal of the Superintendent, etc. remove the member's or candidate's freedom to make decisions for the *benefit of all*.
 4. Consider the backlash when a member finds out that they cannot make good on special interest promises for which they were endorsed.
 5. The best guideline to follow is to take seriously the obligation to listen to all viewpoints. While a board member's decisions may not satisfy everyone in the community, students and parents are best served when the member (or candidate) does not limit their choices to please a certain group. Remember, you may not have all the pertinent information.
8. **Preparing for the board meeting.**
1. Preparing for the board meeting is time well spent
 2. Form preliminary thoughts but remain open to alternate opinions and reasons for those viewpoints.
 3. Being well prepared projects a professional image of effective boardsmanship. This also promotes an image of knowledge and efficiency to the public building trust and confidence in the school system.
 4. A professional board will encourage professional behavior on the part of others.
9. **Board work requires homework.**
1. Strive to become knowledgeable about education. Learn the jargon, terminology and commit to doing home study as necessary.
 2. Learn to hold the well-being of students as the fundamental value of every decision. Never under any circumstances forget the children are the reason for schools.
 3. Learn the history of the district and the state and national goals for education.
 4. Reading materials related to education of board members are available from state and national school boards associations.
10. **Watch these factors when you decide:**
1. Don't make hasty decisions. Consider all of the alternatives before deciding on one
 2. Try to develop at least three alternatives.
 3. Do not be overly tempted to choose an alternative simply because it is easy to understand.
 4. Having too many alternatives can paralyze a board.

11. Five guidelines for obeying the law

1. It is instructive for board members to read the U.S. Constitution with attention paid to Article 1, Section 10 (prohibited powers) and the 1st (freedom speech, religion, press), 5th (no criminal action w/o charges, no double jeopardy, due process) and 14th (basic civil rights) amendments. The majority of lawsuits filed against boards of education are a result of ignorance of constitutional provisions rather than a conscience effort to circumvent them.
2. Stay current with recent state and federal legislation
3. Understand the basis for state and federal court decisions.
4. Understand, accept and adhere to the procedures of due process.
5. It is required that a board keeps students, parents, citizens and employees fully informed regarding school policies, rules and regulations.



12. The board and the organizational chart.

1. Pay attention to the district’s organizational chart to confirm that board members and employees are observing the appropriate lines of authority and responsibility. **Note that there is only one line of authority from the board.**
2. Individual board members are often the first to violate the organizational chart by contacting building administrator and other employees directly with requests, suggestions and even explicit instructions.
3. Individual board members have no more authority than an individual citizen. Instructions given to the Superintendent/principal can come after public deliberation of the full board acting as a team.

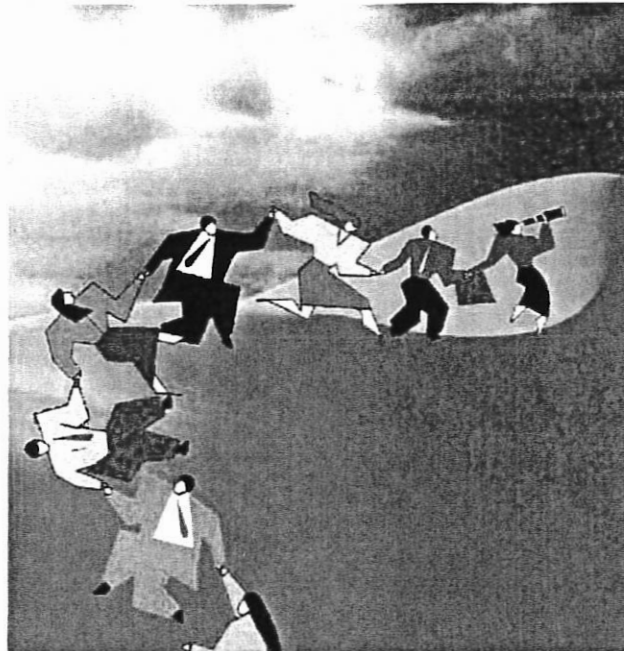
13. You and the Superintendent/Principal

1. The **collective** board is the boss; they determine the climate for the administrative-board working relationship. This is not true of individual board members. A single member cannot give direction to the Superintendent/Principal.
2. Board members should strive to maintain a working relationship with the Superintendent/Principal that is open, friendly and professional. This relationship can set an example for others in the district.

3. Hostility and anger make any situation worse.
4. If friction develops between a board member and the Superintendent/Principal, there should be a process for working out these differences privately. Differences should not be aired to friends, school personnel or the press. A member who airs criticisms publically is not solving problems but fueling them. Disagreements with the Superintendent/Principal are handled privately.
5. Setting goals and direction
 1. All involved with setting goals and direction must be willing to make significant compromises as required by the best traditions of the democratic government.
 2. These compromises must be intellectually and educationally honest. Both the board and Superintendent/Principal should be acquainted with successful educational practices with respect to helping students to become thinking, caring and skilled human beings.
 3. It is the responsibility of teachers, administrators, Superintendent/Principal, board and the citizenry need to provide each other considerable latitude regarding methods employed to accomplish this.
 4. It is the board's responsibility to protect this latitude.
 5. Setting District Goals is a collaborative effort that is discussed in public annually.
6. The board and Superintendent/Principal must agree that there will be no surprises for each other or pronouncements that have not been thoroughly discussed beforehand.
7. It is the responsibility of both the board and Superintendent/Principal that they keep each other well informed about situations that could cause undesirable or irreparable effects.
8. Public quarrels are not only disappointing but they can find their way into classrooms. That must never happen.
14. **Communicating with your colleagues.**
 1. Board deliberation and decision making (other than closed session items) must occur in full view of the public. (ref: The Brown Act)
 2. Voids in communication can be due to personality, philosophy, strongly held opinions or members just may not like each other. Try to repair this communication breakdown.
 3. Do not be tempted to use a third party (Superintendent/Principal) to act as an intermediary or to persuade them to your point of view in hopes of this information getting distributed. This places them in a very awkward and unfair position.
15. **Who speaks for the board**
 1. The board is composed of independent, private citizens serving their communities who, as soon as they become board members, no longer have the absolute freedom to represent solely their own points of view.
 2. The wise board will establish a spokesman for the board. Never for any reason should the spokesman speak personally and "off the record." This rule cannot be violated. The Superintendent/Principal could function as board spokesman.
 3. The spokesman should be someone who:
 1. Is thoroughly conversant with the policies of the board and state and federal laws;
 2. Has an awareness of the goals and directions of the school;
 3. Does not have the freedom or authority to represent their interest as the position of the board.
16. **Where total board agreement is a must**
 1. Before it makes a decision on an issue that will affect citizens, the board will give citizens ample time to discuss and consider an issue

2. If the board is considering a change to curriculum or instruction, the board will involve teachers and administrators appropriately before making decisions.
 3. Those persons who wish to address the board will be treated with courtesy and respect.
 4. Once goals and objectives of the school system are established, they shall be supported by all members; regardless of personal opinions.
 5. The board shall avoid making decisions that are the purview of the administration. This supports the authority of the administrators. Policy decisions are the purview of the board.
 6. People (which could include school staff) will seek out board members to criticize the school for reasons both sound and unsound. Board members should not join in this criticism. Rather, listen intently, and inform the person to contact the cognizant administrator per the appropriate board policy.
 7. Board members should not make promises about changes prior to board approval.
 8. Board members will treat district employees and each other with respect and courtesy.
 9. Board members will not interfere with the administration of schools.
- 17. School is more than what we require**
1. Many reports indicate we don't demand enough of students - need more math, science and language. Legislatures therefore increase the number of units to graduate thereby reducing the child's elective choices.
 2. Remember not to overlook the child's social growth: learning to work with others for the first time, peer pressure, discretion, expectations of society, following the rules, making choices, deal with temptations, pleasures, etc. The Board must have some understanding and a measure of compassion for kids who may struggle with the above.
 3. Provide a time for laughter, joy and celebration. School is more than a place where courses are offered.
18. Visiting schools - N/A
- 19. Warning signs of Board failure**
1. Most boards work harmoniously but in some cases boards move from crisis to crisis which can divide members, administrators, staff and the community. Boards that fail present dire consequences to the futures of students. Warning signs of board failure require corrective action:
 1. The Board demanding a higher standard of performance of the district than they do of themselves. (Treat staff in human and caring ways if staff is to do the same with students and parents.)
 2. The Board demonstrating a lack of courage that its policies are adequate and bowing immediately to the wishes of the most vocal pressure groups or becoming intimidated by them. (Do not bow to pressure and do not seek to lay blame on employees)
 3. Getting in quarrels with the press. (No one can win a quarrel with the news media, least of all a governing body that is responsible and accountable to the people it serves.)
 4. The Board not listening to the community. (The board must regard community opinions as other than interference.)
 5. The Board becoming divided over the effectiveness of the Superintendent. (The strength of a school system depends upon the mutual trust and respect between the Superintendent and the school board.)
 2. The consequences for young people are serious in the case of a failing school board. The primary responsibility of a school board member is to make things better without laying blame on someone else or revising sound practices as a way of gaining wanted support.

A Workshop on High Performing Governance Teams



Introduction *Overview, Outcomes, and Norms*

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Board & Administrator

FOR SCHOOL BOARD MEMBERS

August 2006 Vol. 20, No. 4

Editor: Jeff Stratton

Board service the wrong way: Act like the Lone Ranger

Nick Caruso, senior staff associate for field services for the Connecticut Association of Boards of Education, has an interesting name for board members who like to speak for the board without authorization and “investigate” what’s taking place at the schools with surprise visits.

They’re “Lone Rangers” Caruso said.

Lone Rangers can be disruptive to the smooth operations of the board team. Here’s some insight into what they do and how a board can deal with it.

Caruso tells a story about a board member who visited a school and returned with six pages of notes he wanted to read at a board meeting, detailing problems he perceived with how the school was run. The board president’s response was, “Give that to the superintendent,” Caruso said.

School visits by board members, when they are pop-in events and not planned, are very disruptive, Caruso said.

As with most parts of school board service, there are right ways and wrong ways to do your job.

Wrong way: Visit schools unannounced. Right way:

Be able to say you attended every football game during your term on the board.

If you, as a board member, visit a school and see a problem, there is a proper way to handle the issue, Caruso said. “Call the superintendent, let him know what you saw, but do it in a board-oriented fashion: Do you need more resources? If it’s a personnel issue related to a poor-performing custodian, bring it to the superintendent’s attention and let her handle it.”

‘As an individual board member, you have no more authority than any other member of the public.’

— Nick Caruso

How does the board self-police a Lone Ranger? Caruso suggests reminding him that the board is a committee of the whole. “As an individual board member, you have no more authority than any other member of the public,” he said. ■

Secret meetings lead to administrator’s departure

Board member question: “Recently, we had a non-certificated employee call two board members with complaints about our administrator. Rather than follow our grievance procedure, the board members convinced the rest of the board to meet

secretly to hear the complaint, and we held secret interviews with other members of the staff. Our administrator was furious and resigned over the matter.

continued on next page

B&A For School Board Members

Continued from previous page

“How do we avoid this type of problem in the future?”

The Board Doctor's answer: This board lost its administrator because it ignored two fundamental rules of the board/administrator relationship: The board shouldn't meet without its superintendent, and personnel management is not part of the school board's job description.

Most superintendents will tell you that when a board feels free to manage personnel, it usually feels free to manage other aspects of the district as well.

In addition, when a board provides an open channel to hear staff complaints, it undermines the superintendent's authority. In effect, it's giving the administrator a

“no confidence” vote. I'm convinced that is why this board lost its administrator.

Grievance procedures are in place for a good reason.

Grievance procedures are in place for a good reason. When an employee contacts a board member with an issue related to how the district is managed, the board should always respond by asking the staff member to follow the grievance procedure. ■

Good intentions create bad results

When I counsel board members, I tell them always to communicate with staff through the superintendent. A direct line of communication with staff bypasses the person you hired to manage the schools. It short-circuits communication between the board and administrator.

That advice applies when things are going smoothly, and also when your district faces staff problems. When you get directly involved with staff problems, you take away your administrator's authority to handle and resolve them.

I like to share this story with boards from my early days as The Board Doctor. An administrator contacted me to tell me his board had set up quarterly meetings with the staff to “build better relations—and maybe improve morale around here.” The board invited staff not only to discuss programs, but also the superintendent. This didn't last long.

The sessions had the opposite effect of what the board intended. It created a sense of confusion and worry among the staff, who thought that the board was unhappy with the popular administrator and was trying to fire him. ■

Detroit school board greenlights own police force

The Detroit School Board voted 10-1 to establish its own independent police force just weeks after city Police Chief **Ella Bully-Cummings** and County Prosecutor **Kym Worthy** signed off on the idea.

The district already employs 40 armed police officers, 300 security officers, and 50 or so laid-off city police, who were hired in April to work through the end of this month, *The Detroit Free Press* reported.

The new department will be able to hire, recruit and

swear in its own officers, as well as apply for and receive grants and funding.

If the board had not made this move, its power to employ armed police would have expired next year. Now the district must show the Michigan Commission on Law Enforcement Standards that all its standards have been met. The force will then be completely independent from city control. ■



November 20, 2006

Dear Governance Team Member:

As a leader in education, you recognize the need for continuous learning to enhance your performance on behalf of all students. We are pleased to provide you with information about the most current educational opportunities the California School Boards Association has to offer for all levels of experience.

Newly Elected Board Members

Recently elected to the board? The *Orientation for New Trustees* provides the first opportunity for board members to gain important information about their role as civic leaders. It's offered every year as a pre-conference to *CSBA's Annual Education Conference and Trade Show*. See the enclosed Continuing Education Guide for more information.

Why stop there? The *Institute for New and First-Term Board Members* is a two-day seminar that provides you with a better understanding of your unique role and responsibilities as an education leader. It prepares you for your complex governance role in the areas of effective governance, finance, human resources and student learning. Locations and dates are listed in the enclosed Continuing Education Guide.

For All Governance Team Members . . .

Stay informed throughout the year...throughout the state. CSBA offers programs with the most current information available in the areas of: leadership; issues and trends; and student learning; as well as the Annual Education Conference and Trade Show. Use the Continuing Education guide's schedule at-a-glance and the 2007 Masters in Governance program to assist you in planning your professional development endeavors. A few highlights for 2007:

- ◆ If you're interested in affecting change in the state, it's time to attend the *Legislative Action Conference* held in May. This is a golden opportunity to lobby your local legislators at the state Capitol and hear about the current legislative issues facing schools.
- ◆ Are you ready to become the next board president? Then attend CSBA's Board President's Workshop, a must for all aspiring leaders. You'll receive tips, tactics and techniques to build effective governance teams. You should also attend the session offered on The Brown Act as a precursor to the Board President's Workshop

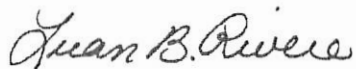


What is governance? Check the Masters in Governance program to find out. This program provides an in-depth look at building effective governance teams by developing leadership skills and utilizing governance tools and strategies to build effective leaders. This program clarifies the roles and responsibilities of the board through nine highly interactive modules. Each module focuses on one specific job of the board, such as maintaining the district's financial health, hiring and evaluating the superintendent, and reviewing and updating the district's policies.

Making well-informed decisions about school policy, personnel, finance, student learning and communications is crucial. You must have access to the best and most current information if you are to serve your students and community effectively. Use the enclosed CSBA program guides to plan your professional development activities for 2007 and chart your path to becoming an effective governance team member.

For details about upcoming events and registration information please visit www.csba.org or call (800) 266-3382.

Sincerely,



Luan B. Rivera
President

Enc. (2)

Procedures for placing an item on the agenda, making a presentation, or speaking to an item on the agenda shall be as follows (Board Bylaw #9322):

Any member of the public or any Board member may request that a matter within the jurisdiction of the Board be placed on the agenda of a regular meeting. The request must be in writing and be submitted to the Superintendent or designee with supporting documents and information, if any, at least seven (7) days before the scheduled meeting date. Items submitted less than a week before the scheduled meeting date may be postponed to a later meeting in order to allow sufficient time for consideration and research of the issue.

The Board President and Superintendent shall decide whether a request is within the subject matter jurisdiction of the Board. Items not within the subject matter jurisdiction of the Board may not be placed on the agenda. In addition, the Board President and Superintendent shall determine if the item is merely a request for information or whether the issue is covered by an existing policy or administrative regulation before placing the item on the agenda.

The Board President and Superintendent shall decide whether an agenda item is appropriate for discussion in open or closed session, and whether the item should be an action item, informational item or consent item.

The agenda shall provide members of the public the opportunity to address the Board on any agenda item before or during the Board's consideration of the item. The agenda shall also provide members of the public an opportunity to testify at regular meetings on matters which are not on the agenda but which are within the subject matter jurisdiction of the Board. (Education Code 35145.5, Government Code 54954.3)

Persons addressing the Board shall be guided by the following conditions (Board Bylaw #9323):

Members of the public are encouraged to attend Board meetings and to address the Board concerning any item on the agenda or within the Board's jurisdiction. So as not to inhibit public participation, persons attending Board meetings shall not be requested to sign in, complete a questionnaire, or otherwise provide their name or other information as a condition of attending the meeting.

In order to conduct business in an orderly and efficient manner, the Board requires that public presentations to the Board comply with the following procedures:

1. The Board shall give members of the public an opportunity to address the Board either before or during the Board's consideration of each item of business to be discussed at regular or special meetings. (Education Code 35145.5, Government Code 54954.3)
2. At a time so designated on the agenda, members of the public may bring before the Board, at a regular meeting, matters that are not listed on the agenda. The Board may refer such a matter to the Superintendent or designee or take it under advisement, but shall not take action at that time except as allowed by law. The matter may be placed on the agenda of a subsequent meeting for action or discussion by the Board. (Education Code 35145.5, Government Code 54954.2)
3. Without taking action, Board members or County Office staff members may briefly respond to statements made or questions posed by the public about items not appearing on the agenda. Additionally, on their own initiative or in response to questions posed by the public, a Board or staff member may ask a question for clarification, make a brief announcement, or make a brief report on his/her own activities. (Government Code 54954.2) Furthermore, the Board or a Board member may provide a reference to staff or other resources for factual information, ask staff to report back to the Board at a subsequent meeting concerning any matter, or take action directing staff to place a matter of business on a future agenda. (Government Code 54954.2)
4. The Board need not allow the public to speak on any item that has already been considered by a committee composed exclusively of Board members at a public meeting where the public had the opportunity to address the committee on that item. However, if the Board determines that the item has been substantially changed since the committee heard it, the Board shall provide an opportunity for the public to speak. (Government Code 54954.3)
5. A person wishing to be heard by the Board shall first be recognized by the President and shall then proceed to comment as briefly as the subject permits. Individual speakers shall be allowed three (3) minutes to address the Board on each agenda or nonagenda item. The Board shall limit the total time for public input on each item to 20 minutes. With Board consent, the President may increase or decrease the time allowed for public presentation, depending on the topic and the number of persons wishing to be heard. The President may take a poll of speakers for or against a particular issue and may ask that additional persons speak only if they have something new to add.
6. The Board President may rule on the appropriateness of a topic. If the topic would be more suitably addressed at a later time, the President may indicate the time and place when it should be presented. The Board shall not prohibit public criticism of its policies, procedures, programs, services, acts or omissions. (Government Code 54954.3) In addition, the Board may not prohibit public criticism of County Office employees.
7. The Board President shall not permit any disturbance or willful interruption of Board meetings. Persistent disruption by an individual or group shall be grounds for the chair to terminate the privilege of addressing the Board. The Board may remove disruptive individuals and order the room cleared if necessary; in this case, members of the media not participating in the disturbance shall be allowed to remain, and individual(s) not participating in such disturbances may be allowed to remain at the discretion of the Board. When the room is ordered cleared due to a disturbance, further Board proceedings shall concern only matters appearing on the agenda. (Government Code 54957.9)

Thank you for your cooperation.

California School Boards Association

The latest CSBA news, blog posts, publications, research and resources for members and the news media.

Q&A: Governance

What new board members need to learn in their first 100 days

By: Kristi Garrett

Running for your local school board is a tremendous commitment, but that's nothing compared with the learning curve that happens once you take the oath of office.

To help new trustees get off to a good start, *California Schools* writer Kristi Garrett sat down with two of CSBA's governance consultants, Leslie DeMersseman and Luan Burman Rivera—both past CSBA presidents—to find out what their experience shows to be the most crucial skills for new board members.

What do new board members need to know about becoming an effective trustee?

LESLIE: To me, the hardest thing for new board members is recognizing that they have joined a body that has collective authority—that, as an individual, they have no authority. Anything that they would like to see happen, they have to work through with the rest of their board. All decisions are made by the collective body, not by individual trustees.

New board members, in particular, have a need to feel like they're doing something. Generally, people who are elected to school boards are doers and problem solvers; that is why they are inspired to run and why people elect them. So when people come to them—whether it's staff or a community member or whomever—with their problems, a new board member feels like they've got to do something about it; they want to fix things and they have no authority to do that. In fact, they're probably stepping all over their board policies in trying to fix somebody's problem, because there is someone on staff who is responsible for resolving that issue.

So if a community member comes up to them in the grocery store, or perhaps a parent sees them on a campus and approaches them with a concern—what should a board member do with that?

LESLIE: Board members do have to be accessible to the community. They can't just say, 'I can't deal with that, I'm a board member and we don't do that. We have collective responsibility.' They've got to listen to be sure they understand, and they've got to try to be an empathetic listener. But then the board member needs to send the person back into the system at the most appropriate place.

So if it's a parent who's concerned about the teacher, then you ask them: 'Have you spoken to the teacher? It might be very helpful for you to go in and listen to the teacher or share the concern and hear what the teacher has to say. Then, if you're not happy, you should go to the principal.'

It's even more important with staff. By law, there are lines of authority and chains of command in school districts that the staff has to follow. A board member who gets into the middle of that—especially if they start taking sides among staff members—is violating somebody's rights. That can turn into a litigious issue.

LUAN: Also, when board members hear concerns out in the community, they need to let the superintendent know that there are issues brewing so the superintendent is informed and can respond appropriately.

LESLIE: Yes, the superintendent can look into an issue, but it's not up to board members to do research and dig around trying to figure out what is going on. That is what they hire staff to do.

What does a new board member need to know about the Open Meeting Act, or the Brown Act?

LESLIE: I think probably the hardest thing is that, by law, they are not to engage with the public on any item that is not on the agenda. The point of the public comment period is for the public to give input on a subject that is not on the agenda. Sometimes, new board members in particular want to engage—have a dialogue—after the person has made their comment, to have a discussion with them.

LUAN: There's this tendency to feel uncomfortable because someone has come and shared with us, and now we can't respond to them? It just feels unnatural and weird to people.

But the point of the Brown Act is to protect the public's right to know. All of the board's work is done in public, except for closed session items.

The reason the board cannot discuss a topic that is raised in public comment is because that item was not on the agenda. Therefore, the rest of the community was not aware that that particular item would be discussed at the meeting. So if you discuss that topic, you are really violating the rights of the rest of your community.

The item might be placed on an agenda at a later date, or perhaps it is something that will be handled administratively. There are a number of ways to resolve issues, but items cannot be discussed that evening if they are not agendaized.

Why is that important?

LUAN: Because if you start engaging a member of the public in a debate and deliberation about a topic, then you've elevated somebody to the board table who has not been elected. The board is conducting its meeting in public; it is not a community forum, it is not a town hall meeting. It is the board doing its work in public. The board is informed by public comment, but the deliberation takes place between the board members. The board is the elected authority that is entrusted with the responsibility to deliberate and make those decisions.

School finance is such a complex, convoluted body of knowledge, how can a new trustee begin to get up to speed?

LESLIE: I think one of the confusing things for a brand new board member—if they were elected in November—is that in December they will likely have to approve their district's audit at their very first meeting, and they're also required by law to approve the first interim financial report. So right off the bat, before they've had any background on that at all, they're taking those actions because of the legally required timelines.

A great place to start learning about finance, then, is at their first CSBA Annual Conference, where they can attend the Orientation for New Board Members, and in January there's the Institute for New and First-term Board Members that covers finance in greater detail.

LUAN: And of course there's an entire module on finance in the Masters in Governance curriculum.

LESLIE: And we always get some good information from the experts during our Forecast Webcast in January. So there's help to be had.

I think in the meantime, though, it's a perfectly good question to ask the superintendent: How can I as a new board member get up to speed? Do we have an orientation? If it's not offered, new board members need to ask to be oriented on finances, or curriculum, or facilities—whatever big things are happening in the district.

We really stress the importance of having a new board member orientation. My preference is that they do that as an entire board, with the superintendent. Maybe it's about facilities or Program Improvement; ask 'How do I learn about all that? How do I know what that means?' They are learning a second language. And they should be strong enough, when somebody's using an acronym, to say 'would you help me remember what that means?'

LUAN: If the new board member does not understand the meaning of an acronym, then the odds are that members of the audience do not understand it either.

So are those orientations formal, noticed meetings?

LESLIE: Yes, everything is noticed. The only way they wouldn't be is if the meeting included less than a quorum and is not part of a serial meeting, where the same subject is discussed with other board members in some combination that adds up to a quorum.

LUAN: An orientation session is hugely important, but then new board members should also know that they can go back to the superintendent and ask their questions. Perhaps the superintendent will recommend that they need to get more financial information, and therefore spend more time with the chief business official. Or if they want to know more about curriculum, they should see the person who is in charge of curriculum and instruction in the district. New board members should get an idea of who is in charge of these different programs and where they can get additional information.

So is the study session, or orientation session, a good way for a new board member to learn about the district's operations? Also, what do board members need to know about the students in their district?

LESLIE: They need to know what their student demographics are. They need to know how many schools they have. They need to know the names of the key people in the district, whether they're administrative staff, maintenance staff or principals, etc. Who are the board officers and what are their roles? How to reach the people you need to reach.

And the preferred methods for doing that?

LUAN: Right.

LESLIE: I think there's another issue new board members need to be aware of. Maybe I ran for the board because I didn't think we were doing the best job we could for our GATE students. So the question to ask is, 'How can I bring up that interest?'

When I was on the board both of my kids were involved in drama. The head of the drama department and the band director put on a musical every year. Then they put on student productions and did competitions where they went out to other schools. It was really an award-winning program. They were putting in many, many more hours than any of our sports coaches, yet the stipends were much smaller.

So I went to Bill, our superintendent, and said this didn't seem fair to me. I didn't want to rant and rave at the board meeting because everybody knew my kids were in drama. So how could I approach this so that it was looked at in comparison to other stipends? I didn't want to become the person who is advocating only for this one group. Bill suggested that I ask, 'What is our process for deciding what the stipend is for the various extracurricular activities that our staff is participating in? And how can we make sure that our stipends are fair and equitable for all of our extracurricular activities and for the staff participating in them?'

So it's getting at the policy level question. Whatever your interest is, you've got to try to make sure that there's fairness and equity through the policies you have in place.

LUAN: So it's balancing all of these different aspects of your decision making: Serving all the kids, working together as a team, responding to all your different constituent groups, and balancing in your own beliefs and values. Not losing those beliefs and values, but balancing them into all these other factors.

LESLIE: This is perfect for this conversation. Because the new board member has no idea ...

... Of how to balance their own beliefs and values—which is why they ran and maybe had a great deal to do with why they were elected—with the board's overall responsibilities?

LESLIE: Right, and with their legal responsibilities. Their own beliefs and values are not at the top of that list. But what's the most important thing you have to do? It's making sure that every child in the district has the very best opportunity that you can provide. That really is what our public education system is about.

Top 10 things every new board member should learn to do	
10	Think kids!
9	Work as a team and speak with one voice
8	Keep confidential matters confidential
7	Maintain the big picture view
6	Listen, learn and ask questions
5	Understand and stay within your role
4	Respect the past and work toward the future
3	Abide by the Brown Act
2	Accept that change takes time and planning
1	Think kids and advocate, advocate, advocate!

(Adapted from CSBA's New Board Member Orientation)

Some of your consulting materials mention working as a team, speaking with one voice, and collective responsibility. Can you expand on what that means?

LESLIE: That's hard, the speaking with one voice. If I'm a new board member and that evening I just lost a vote four to one and the media meets me out in the hall asking, 'What happened?' I could say, 'The rest of the board just doesn't get it. I'm voting like my constituency wants me to.'

LUAN: That's a really important point, because I've heard so many people say, 'My constituents want...' Well, who are your constituents? There are people who elected you, but once you're on the board, you're serving all of the children in your community. You're not serving a constituent group anymore. Making that shift is important.

LESLIE: And that principle also means standing behind the board's decision. Your responsibility is to deliberate at the board table, and then once the vote is taken, you stand behind that. You don't have to be the main cheerleader, but the answer to the reporter's question is: 'You know, we had a really good discussion, I made my points as hard as I could, but the board voted and this is the direction we're going.' Because otherwise it throws the district into mass confusion.

I've also heard you say that maintaining confidentiality is an important thing for new board members to recognize.

LESLIE: They're going to hear things in closed session that cannot be shared. And there are only a few things that can be discussed in closed session.

LUAN: Basically, there are things that cannot be discussed in open session because it would be fiscally irresponsible to do so. In other words, if you're negotiating a contract with someone, you're not going to talk about that in open session because it could cost the taxpayers more money. So negotiating a contract, real estate transactions, any personnel issues, private things where privacy rights must be respected and due process followed—basically items protecting the rights of individuals—are all topics that must be discussed in closed session.

LESLIE: Anything where there may be litigation. Now, this is the only part of the Brown Act that has teeth. Any person who violates the confidentiality of closed session, or executive session sometimes it's called, has actually committed a misdemeanor.

LUAN: There are serious legal consequences if any of that information leaks out. Board members cannot discuss these items with their spouses, their best friends or their cousins down the street. They really can't talk about those things with anyone else except the people in that room. And that's a hard one.

Another principle on the list is maintaining the big-picture view—is that regarding the students' welfare or what?

LESLIE: It's regarding everything. What we tell the board is, you're not the doers. You set up the big picture framework. You set up the policies; you create the vision, what it is we want. The big picture view is to see that the district is well run, but not to run it. So it's putting in place what we want our kids to know and be able to do when they walk out of our doors. Then you say to the staff, 'How are you going to do that?' And then the staff does that. But it's not getting into that nitty-gritty, day-to-day stuff.

You've also talked about how new board members need to ask questions. How does understanding the history of the board and the district come into play?

LESLIE: Every two years during elections there's the potential of having people say and do awful things, and actually cause some damage. For one thing, you may not agree with the decisions that a prior board made. But

once you are on a board for a while you understand why that decision was made. You weren't privy to all the information.

LUAN: I think what Leslie's saying is really important because I don't know how many times I've heard board members say, I really didn't agree with this, but now that I'm here and I understand why this decision was made, and it makes sense.

LESLIE: One of the things I love during a Good Beginnings workshop [from CSBA's Governance Consulting Services] is that by the time you're done you've got charts that go all the way around the room, and it's all about what they want for their kids. And all of a sudden everybody recognizes that, you know what, we've got a lot more in common than not. We may disagree about how we want to get there, but we're here for the right reasons. And if you understand that, you can get past some of that other stuff and you can have the better conversations.

What other questions should new board members ask?

LUAN: Questions like, how does something get to the agenda? What do I do if I have questions before the board meeting? That's important information for them to have.

LESLIE: Do we have a governance handbook, and what are the bylaws and protocols? Do we have agreements about how we work, and what are they? Can I talk about them? What if I don't like them?

LUAN: I like to encourage new board members to be patient with themselves. It's a huge job, there's so much to learn, and not to feel upset and frustrated. They won't know everything right away. There's a huge learning curve there.

As long as they're committed to doing the work, being prepared and learning the information as they go along, they should feel good about that and just be patient with themselves.

LESLIE: It really is a two-year process. The first year everything is new, and the second year you start having the "aha" moments.

That's why there's a whole board and not just one person.

LESLIE: Right.

LUAN: The other thing I would say is that I think learning to listen empathetically is really crucial. The reason there are five or seven people on your board is that all these different perspectives are brought to the table to provide the opportunity for good deliberations to occur. It affords the board the opportunity to come to a good, collective decision that is in the best interests of kids.

But you have to learn to really listen to each other. It's not good deliberation if I shut down as soon as Leslie starts to talk because Leslie and I ran against each other and I'm mad at her. You have to really learn to listen to everyone and take those perspectives in. You might have an opinion about an issue, but you need to get to where you can listen to other people with an open mind and take in those opinions, as well.

LESLIE: The other thing that I've often said to new board members is that most of them have had multiple leadership responsibilities in their lives. Serving on a body with collective authority is unnatural. It's very hard work. For most people who serve on boards, it's just not natural.

LUAN: Other than being a parent, it was the biggest growth experience of my life.

LESLIE: Absolutely true.

It's a humbling experience?

LUAN: Humbling and a big growth experience, too, it's both. You really learn so much. You learn so much about education, about schools, but you also learn about working with people too. You learn to be flexible when working with people. Because if you really want to make a difference for the children, that's a crucial skill.

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