

# *Weed Union School District*

## *Governance Handbook*

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### **Unity of Purpose, Roles & Responsibilities, Norms & Protocols**

This Governance Handbook reflects the governance team's work on creation of a framework for effective governance. This involves ongoing discussions and agreements about unity of purpose, roles, norms and protocols that enable the governance team to continue to perform its responsibilities in a way that best benefits all children.

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# *Weed Union School District*

## *Governance Handbook*

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*The Weed Union School District Governance Handbook was reviewed and revised in January 2009.*

*Weed Union School District*  
Governance Handbook

# *Effective Governance*

*California School Boards Association*

## **Governance – A Definition**

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**School district governance is the act of transforming the needs, wishes and desires of the community into policies that direct the community's schools.**

As the governance team fulfills responsibilities in the areas of setting direction, human resources, policies, student learning and achievement, finance, judicial appeals, collective bargaining, and community relations and advocacy, the way in which governance team members perform the governance role is critical.

Whether in the boardroom, out in the community or at home, board members are always trustees for the district. The integrity of the school district's educational program is dependent upon the responsible and professional manner in which each board member, and the board collectively, fulfills governance roles and responsibilities with the superintendent. The demeanor of governance team members sends an important message to the public.

Utilizing effective governance techniques, private citizens, once elected to school boards, work with the superintendent to keep all district efforts focused on student learning. Effective governance tenets encompass the basic characteristics and behaviors that enable governance team members to effectively create a climate for excellence in a school district.

The community elects school board members to set and monitor the direction of the school district, but the district superintendent will translate all efforts into action. It is therefore vital that the board and superintendent have a respectful and productive working relationship based on trust and open communications.

Working as a group, board members and the superintendent leverage the efforts of the professional staff by setting a direction for the district reflective of the community's wishes for its children, by creating a supportive framework for action in the district, by holding the system accountable through mutually agreed upon mechanisms, by providing support to students and staff through behaviors and actions, and by demonstrating community leadership on behalf of children, district schools and public education. When this is done effectively, the chances of a climate for excellence being created in which students thrive, increases dramatically.

## WORKSHOP NOTES

### 1. The best things about our school board are...

- Familiarity with the community
- Willing to work
- Striving to improve community support for the schools
- The reputation of “good schools” will draw people in
- Commitment to marketing the schools and district
- Strong passion for students – they are our future
- Willingness to investigate charter schools
- Open to new ideas
- Respectful towards each other
- Agree to disagree
- Try to have unity
- Follow protocols

### 2. Areas we can improve upon as a governance team...

- Learning the ropes of boardsmanship
- Exploring ideas to better serve students and community:
  - A. Charter schools
  - B. City school district collaboration (ie: Joint meetings, discussing joint interest, ongoing 2x2 meetings between city and school districts)
  - C. Articulation with the high school district
  - D. Informing and engaging all our community stakeholders

## ***Working As An Effective Team***

### ***California School Boards Association***

To effectively focus all district efforts on student learning and achievement for all students, a governance team needs to have a unity of purpose, a mutual understanding of roles, positive working relationships and supportive structures and processes. One of the chief ways a governance team can strengthen or maintain its effectiveness is to periodically assess its own performance in these areas.

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#### **Unity of Purpose**

The foundation of effective governance is the common focus governance team members share that helps them transcend their individual differences to fulfill a greater purpose. Unity of Purpose is the super-ordinate goals, the core values and beliefs governance team members share in common about children, the district and public education.

#### **Roles**

Effective teams value and respect their essential roles, reach mutual agreement on the roles of the board and superintendent and strive to operate within them.

#### **Culture**

Culture is the positive or negative atmosphere created by the way people in an organization treat each other. Teams have unwritten (implicit) or written (explicit) agreements about how they will behave with each other and others. These behavioral ground rules, often called norms, enable teams to build and maintain a positive culture or shift a negative one.

#### **Structure and Process**

How boards operate and how they do business as an effective team occurs when members discuss and agree on the formal structures and processes used by the board (e.g., agenda structure, visiting schools, handling complaints or concerns from the community, bringing up a new idea).

## *UNITY OF PURPOSE*

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**Unity of Purpose is a common focus, super-ordinate goals, the values and beliefs governance team members share in common about children, the district and public education that help them transcend their individual differences to fulfill a greater purpose.**

**–CSBA**

## ***Weed Union Governance Team***

### ***Who Are We?***

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The Weed Union Governance Team (Board & Superintendent) members are leaders who care about our students, the school district and our community. We are people who are committed to public education and understand the role education plays in sustaining our democratic society. We represent the entire community: children, parents, staff, businesses, and all community members. We hold the interest of ALL the children in trust. We have been chosen to provide educational leadership to the district and to see that the mission of the district is achieved. Even though we bring our individual perspectives and experiences to the table, we are committed to developing collective understanding, making informed decisions and operating as a unified team.

### ***What Is Our Purpose?***

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We are a leadership team, responsible for the realization of the mission of our District while being fiscally responsible with the public monies in our trust. We consider the future, as well as the present and maintain our focus on our mission, vision and goals that were developed through inclusive processes. We have the responsibility to do the best job we can for our students within the state and federal requirements, and to see that our students graduate from our schools able to become responsible citizens. We see that the necessary resources are available to our staff to do the work we expect of them. We inspire, engage and inform our staff and community about education issues on behalf of our students, our district, our teachers and public education.

### ***To Whom Are We Responsible?***

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We are responsible to our **children** to provide the best possible education in a safe, nurturing, challenging learning environment. We are responsible to district staff to provide necessary resources and a safe, supportive, challenging work environment. We are responsible to parents to provide a free public education for their children in an environment that is physically and emotionally safe for the children and their families, and to provide avenues for their involvement in their children's education. We are responsible to our voters and taxpayers (to provide a high quality of education in our schools so the community is perceived as a good place to live) to use public funds efficiently and effectively. We are responsible to our entire community to keep them informed and help them understand the benefits of our educational system whether or not they have children in our schools. We are responsible to the state and federal government to obey the law, to be informed and to keep other elected officials informed about the effect of legislation on our district, and to advocate on behalf of our children, the teaching profession and our schools. We are responsible to the other members of our team to come to meetings prepared, to be interested and informed, to be committed to our work, and to be respectful and honest in our interactions.

## *GOVERNANCE ROLES AND RESPONSIBILITIES*

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**Effective teams value and respect their essential roles, reach mutual agreement on the roles of the board and superintendent, and strive to operate within them.**

**–CSBA**

***A Discussion of WUESD Roles and Responsibilities***  
***California School Boards Association***

***Effective teams value and respect their essential roles, reach mutual agreement on the roles of the board and superintendent, and strive to operate within them.***

There are important distinctions to be made between the board's role and that of the superintendent and staff. The board and superintendent must team together to ensure a district has effective leadership. Just as board members should govern and not manage a school district, superintendents should not administer a district in isolation from the representatives whom the public has entrusted with the schools. School board "trustees" are the representatives of the people, elected to ensure a community's schools educate the community's children in accordance with the wishes of the local community.

Board members have collective, not individual authority. Authority to make decisions is only granted to the board as a whole. The full board gives direction to the superintendent, most commonly at board meetings. Individual board members do not have the authority to direct the superintendent, unless otherwise agreed to by the board and superintendent.

The role of the school boards is not to run the schools, but to see that the schools are well run. When a board member inadvertently takes over the staff role, he is in essence vacating his board seat and effectively undercutting his ability to govern. He is forfeiting his ability to hold the superintendent responsible for the way the board's policy direction is translated into action by the professional staff.

## ***To The Weed Union Governance Team Effective Governance Means...***

- The board collectively setting the direction for the district.
- Keeping district efforts focused on student learning.
- Creating a climate of excellence by:
  - providing the necessary resources so students and staff can be successful,
  - supporting students and staff through our behaviors and actions,
  - holding the system accountable by establishing clear expectations for students and staff, instituting and consistently following fair evaluation processes, and requiring changes as necessary, and
  - providing community leadership on behalf of students, the district and public education.
- Being good stewards of district finances and communicating about the budget and budget processes with the community by:
  - leveraging the funds we have to create a climate of excellence
  - spending this year’s money effectively, and
  - budgeting wisely for future years
- The board and superintendent have a respectful, productive working relationship based on trust and open communication.
- The superintendent and staff translate the board’s direction into action.
- Communicating to the entire community about the role of the board and what “governance” is.
- Maintaining open, two-way communication with all stakeholders about district programs, activities, challenges and accomplishments.

## ***What the Board Needs From the Superintendent to be Successful***

- Professionalism, calm in storm, focus on results
- Consistency of performance; appropriate timely response
- Act as Cheerleader for Weed Elementary
- Brilliant creativity; to try new things
- Direction on what trustees need to know
- Type of information Board needs from Superintendent regarding information that the public may see or hear. Major not minor stuff
- Recommendations that blend data, research issues and professional expertise
- More thorough explanation of information presented in the board packet
- No surprises
- Respect for each other's feelings; check assumptions with trustees
- No monthly meeting with trustees
- To understand that just because I (trustee) do not call doesn't mean I'm not involved
- Foster open communication with the community. Superintendent has an open door policy. Contact may be made by email, phone, appointment or drop in
- Communicate with the public with specific focus on addressing the image of the district by writing a monthly news column regarding the school
- Balance with personal life

## ***What the Superintendent Needs From the Board to be Successful***

- Clear direction from Board while respecting my professional expertise
- To allow me to ‘dream’ and share these dreams with trustees in the Friday letter. I will be specific about expectations for a response to ideas within a span of five days before board meeting
- To try new things
- Rein me in – support innovation with reality and resources
- Confidentiality
- Respect for each other’s feelings
- No surprises
- Check assumptions with Superintendent
- Board leadership within the community

## *POSITIVE GOVERNANCE TEAM CULTURE*

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**Culture is the positive or negative atmosphere created by the way people in an organization treat each other. Teams have unwritten, (implicit), or written, (explicit), agreements about how they will behave with each other and others. These behavioral ground rules, often called norms, enable teams to build and maintain a positive culture or shift a negative one.**

**–CSBA**

## *The Legacy We Want to Leave*

We want to leave a district where:

- There is fiscal stability
- Decisions are made for the students of the past and future
- There are budget parameters
- There is a collaborative culture where the interest of the students is paramount
- All the decisions of today will stand the scrutiny of the future
- District campus is safe, secure and clean
- WUESD is a model district for academia
- The most professional staff are hired

## ***Weed Union Elementary Team Norms and Meeting Guidelines***

- Closed Session to be held from 6:00 to 7:00 pm
- Administrators to be prepared in advance of meeting
- Base decisions on how all children benefit
- Respect for ourselves and others
- Open to ideas of others
- Agree to disagree – not to be disagreeable
- Come prepared for meetings
- No surprises
- Maintain confidentiality
- Address the issues, not personalities
- Collectively support final decisions
- Remind the public that this is a business meeting being held in public – not a public meeting
- Establish protocol that the public speaks during the Public Comment time listed on the agenda
- Consistent Board Member attendance at Board meeting is expected

## *The Behaviors By Which Our Team Is Characterized*

### *We agree to:*

- Work together as Governance Team members to be supportive of the roles each carry out.
- Demonstrate civility in all our interactions with others.
- Demonstrate competence in the jobs we are assigned.
- Have an open-mind – not come to the table with a particular agenda.
- Speak with a common voice, stay on message, and communicate the same things about our agreed upon strategic goals and other important district issues.
- Provide opportunities so that all voices are heard.
- Frame topics for the community so that we are able to stay on task.
- Operate within our own parameters for meeting behavior.
- Provide accurate information to the public prior to our meetings.
- Encourage school leaders to voice opinions in a positive manner.
- Always model open, positive communication and listen without being defensive.
- Take the time to celebrate together.

## *SUPPORTIVE STRUCTURES AND PROCESSES*

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**Effective teams discuss and agree on the formal structures and processes used by the board and superintendent in their functioning as a team (e.g., agenda structure, visiting schools, handling complaints or concerns from the community, bringing up a new idea, how to handle complex community issues); how boards operate, how they do business.**

**–CSBA**

## *Orientation of Prospective Board Members*

### **Key Points to Discuss with Prospective Board Members:**

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- Board members don't run the district but see that the district is well run.
- The board operates as a “body” when making decisions and then stands behind those decisions as staff carries out the work.
- The board serves **all** students at **all** school sites.
- Be prepared to answer questions about:
  - Time commitment
  - Culture of the board as a collaborative, consensus building unit
  - Governance Team Core Values and Beliefs
  - Culture of the district
  - District Mission and Goals
  - Where to get district specific information
- Encourage prospective board members to attend board meetings.
- Inform prospective board members about:
  - the Governance Team Handbook
  - the District Policy Book
  - the District Budget
  - the Brown Act
  - New Board Member Orientation at CSBA Annual Conference
- FYI: Board members rarely receive kudos.

*Protocols and Procedures to Facilitate Governance Leadership*

ISSUE	PROTOCOL
<p><b>Board/Staff Communication</b></p> <p><i>Questions of teaching staff outside of Board Meetings.</i></p>	<ul style="list-style-type: none"> <li>● Trustees will call the Superintendent with questions or requests for information. The Superintendent will direct a Trustee to the appropriate staff member for answers.</li> <li>● The exception to this process is when there are questions about warrants. The Business Manager will be contacted directly with warrant questions.</li> </ul>

ISSUE	PROTOCOL
<p><b>Handling Complaints in the Community</b></p>	<ul style="list-style-type: none"> <li>● When approached by a community member with an issue or concern, board members will listen openly and repeat back, question, or paraphrase to ensure understanding of the issue or concern.</li> <li>● The trustee will explain that the district has complaint policies in place and if appropriate, will let the community member know what the complaint policy is and how they may access the process or procedure.</li> <li>● Trustees will strive to ensure a community member feels heard and empower with next steps. Board members will use judgment in responding, being mindful of their role in judicial review.</li> <li>● The Trustee will communicate the community member’s complaint, issue or concern, to the Superintendent.</li> </ul>

ISSUE	PROTOCOL
<p><b>Handling Complaints of Staff</b></p>	<ul style="list-style-type: none"> <li>● When approached by a staff member with an issue or concern, board members will listen openly or paraphrase to ensure understanding of the issue or concern.</li> <li>● Trustees will remind staff of the complaint process and the role of the individual board members.</li> <li>● The school board is likely to become the “court of last resort” in personnel issues, so board members agree to be extremely careful not to become involved in personnel issues. In order to be able to give these situations an impartial hearing, board members must not have been engaged in the situation at an early stage.</li> <li>● The Trustee will communicate the staff member’s complaint, issue or concern, to the Superintendent.</li> </ul>

*Protocols and Procedures to Facilitate Governance Leadership*

ISSUE	PROTOCOL
<b>Role in Public</b>	<ul style="list-style-type: none"><li>• Trustees represent the board in what they say and do and will set an example of professionalism.</li><li>• Trustees will strive to educate the public about their role as public servants, entrusted with the education of all the children of the community.</li><li>• Trustees will make visible their dedication and commitment and clarify their authority as one of five in all decisions and actions.</li><li>• Confidentiality will be maintained at all times.</li></ul>

**How do we want to be perceived?**

- Pro-active
- Visionary
- Humble
- Appropriately Motivated
- Civic Servants
- Student-centered
- Influential/not controlling
- Committed/Dedicated

## ***CARRYING OUT RESPONSIBILITIES AND JOBS***

**Working as the governance team, the superintendent and board leverage the efforts of the professional staff by setting a direction for the district reflective of the community's wishes for its children, by creating a supportive framework for action in the district, by supporting the staff and students as district work is being carried out, by holding the system accountable through mutually agreed upon mechanisms, and by providing community leadership for children, district schools and public education.**

**–CSBA**

## ***Summary Recommendations and Next Steps***

1. To address the improved communication goal, use the “Areas of Urban School Board Governance: Community Engagement” document as an audit to assess where we are and where we want to be as a school district.
2. Develop specific, measurable goals and strategies on community engagement and, specifically, how to market our schools.
3. Consider adopting the CSBA Professional Governance Standards.
4. Consider using the CSBA Sample District Governance team’s effectiveness.
5. Use your agreed upon norms for periodic self-evaluation on the governance team’s effectiveness.
6. As a follow up to the workshop, do the superintendent-facilitated “Building Trust Among Board Members” activity at an upcoming meeting. Ideas generated could be incorporated into your existing board norms.
7. Periodically review, revise, and update Board Policy Series 9000 (Board Bylaws).