



**Governance Handbook
Woodland Joint Unified School District
Board of Trustees**

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This handbook reflects the governance team's work on the creation of a framework for effective governance.

Table of Contents

Page	Topic
3	WJUSD Mission and Vision
3	Core Values and Beliefs
3	District Goals
3	Graduate Profile Skills and Competencies
4	Roles and Responsibilities of Board Members
5	Roles and Responsibilities of the Superintendent
5	What the Board Collectively Needs
6	Board Norms
6	The Best of Us
8	Welcoming New Members
8	Annual Organizational Meeting
8	Speaking With a Common Voice
9	Assigning Work to Staff
9	Addressing Conflict Among Board Members
9	School Visitations
9	Board Meetings
9	Placing Items on a Board Agenda
9	Developing the Board Meeting Agenda
10	Having Questions Related to the Agenda Prior to a Board Meeting
10	The Role of a Board Member During a Board Meeting
10	The Role of the Board President
10	Board Meeting Parliamentary Procedure
12	Board Member Reports at a Board Meeting
12	Individual Board Member's Request for Info., Materials or Action
12	Board Meeting Guidelines
12	Public Comments During a Board Meeting
13	Voting
13	Voting No, Abstaining, or Recusal
14	Quorum
14	Additional Board Information
14	Board Appointed Committees
14	Electronic Media
15	Complaints From Community/ Staff
15	Conflict of Interest
16	Role as a Judicial Body
16	Electioneering
18	Accord Page

The WJUSD Mission

To prepare and empower all students for a future of endless possibilities.

The WJUSD Vision

“Excellence For All”

We Strive For:

- ❖ Excellence in Student Achievement
- ❖ Excellence in Communication
- ❖ Excellence in Facilities and Operations

Core Values and Beliefs

We believe (Notes from January 9, 2021 board retreat):

- A learning community should embody a love of learning
- A learning community should demonstrate passion and determination
- A learning community is more intelligent together than apart
- A learning community should be equity focused
- A learning community should share its passion to help students find their passion
- A learning community undertakes actions that matter
- A learning community embraces stewardship and service
- A learning community is resilient
- A learning community should have high expectations
- A learning community should challenge and support its students
- The Board of Trustees should be human and accessible

District Goals (Current LCAP Goals)

Goal 1: College and Career Ready

Each student will meet the skills and competencies of the graduate profile in order to be college and career ready through a rigorous, intellectually rich, and culturally relevant environment.

Goal 2: Meet Social-Emotional and Academic Needs

Each student’s individual social-emotional and academic needs will be met through quality first instruction, enrichment, and intervention in a safe, supportive, and inclusive environment.

Goal 3: Accelerate English Learner Achievement

Accelerate the academic achievement and English proficiency of each English learner through an assets-oriented approach, and standards-based instruction.

Goal 4: Engagement and Leadership Opportunities for Youth

Provide meaningful engagement and leadership opportunities for youth to directly and significantly shape each student's education and school community.

Graduate Profile Skills and Competencies

Curricular Competency

Through a rigorous offering of ethnically sensitive, standards-based classes and courses, students experience a sequence of learning that will prepare them for either college or career.

Critical-thinker/Problem-solver

Students reason to understand complex issues with the ability to frame questions and construct solutions.

Communicator

Students seek to understand and be understood through clear, concise writing, and collaborative, respectful, open-minded articulation and discussion.

Creative

Students explore multiple possibilities and use originality of thought to produce or express themselves through different modalities.

Civic and Cultural Awareness

Students develop and demonstrate an awareness of their responsibility to contribute to a diverse society. They recognize and respect the differences of people from other ethnic and cultural backgrounds by celebrating diversity and individuality, including students of varying social, emotional & physical abilities.

Responsible/Productive

Students demonstrate a strong work ethic; complete tasks on time; utilize resources to get - assistance when needed; prioritize attendance; and contribute effectively in society.

Roles and Responsibilities of Board Members

The role of the board is to provide each student with an education of the highest possible quality within the limits of financial support provided by the State of California. To accomplish this, board members are responsible for five roles identified by the California School Boards Association (“CSBA”):

- 1. Setting the direction** for the district by involving parents/guardians, community, students and staff while focusing on student learning and achievement.
- 2. Establishing an effective and efficient structure** by employing the superintendent, developing and adopting policies, establishing academic expectations and adopting curriculum and instructional materials, establishing a framework for hiring staff, establishing budget priorities and adopting the budget, providing safe and adequate facilities to support student learning, and setting parameters for negotiations with employee organizations and ratifying collective bargaining agreements.
- 3. Providing support to the superintendent and staff** by following standards of responsible governance, making decisions and providing resources that support district priorities and goals, upholding board policies, and being effective spokespersons by being knowledgeable about district programs and goals.
- 4. Ensuring accountability** through evaluation of the superintendent; monitoring and evaluating policies; serving as a judicial and appeals body; monitoring student achievement and

program effectiveness; approving, monitoring, and adjusting district budgets; and monitoring the collective bargaining process.

5. Providing community leadership and advocacy on behalf of students, the educational program, and public education.

Roles and Responsibilities of the Superintendent

CSBA identifies the following standards and roles for superintendents working with the Board of Education:

- ✓ Promotes the success of all students and supports the efforts of the board to focus on student learning and achievement.
- ✓ Values, advocates and supports public education and all stakeholders.
- ✓ Recognizes and respects the different perspectives and styles of board members, staff, students, parents, and community, ensuring the diverse range of views informs board decisions.
- ✓ Acts with dignity, treats everyone with civility and respect, and understands the implications of demeanor and behavior.
- ✓ Serves as a model for the value of lifelong learning and supports the board's continuous professional development.
- ✓ Works with the board to support collective responsibility, by the Board, for building a unity of purpose, common vision, and positive organizational culture.
- ✓ Recognizes that the board/superintendent governance relationship is supported by the district's management team.
- ✓ Understands the distinctions between board and staff roles, and respects the roles of the board as the representative of the community.
- ✓ Understands that the authority rests with the board as a whole, provides guidance to the board to assist in decision-making, and provides leadership based on the direction of the board as a whole.
- ✓ Communicates openly with trust and integrity, including providing all board members with equal access to information, and recognizes the importance of both responsive and anticipatory communications.
- ✓ Accepts leadership responsibility and accountability for implementing the vision, goals, and policies of the district.

What the Board Collectively Needs (Notes from January 9, 2021 board retreat)

Information and Data

The Board needs answers to questions

The Board needs access to data and information

Internal Supports

The Board needs to have an awareness of our role, responsibilities, and limitations

The Board must have mutual trust

The Board needs to provide peer support and hold each other accountable

The Board needs to have respect for the processes in place

The Board needs respectful and informed communication

The Board needs to forward inquiries from the community to staff

Organizational Culture

The Board need to foster a commitment to our organization's mission and values

The Board needs to consider staff and student input and engagement

Board Norms (Commitments and Agreements developed at the January 7 and 9, 2021 board retreat)

Listed below are the norms we agree to follow so that each member of our team feels comfortable and is able to honestly state their own perspective, issues, and concerns:

Commitments

We commit to

- ✓ Fairness
- ✓ Having Empathy
- ✓ Being Respectful
- ✓ Finding Common Ground
- ✓ Using a Respectful Tone
- ✓ Being Prepared
- ✓ Building Bridges
- ✓ Being Youth-centered

Agreements

- ❖ We agree to continue to develop relationships between board members
- ❖ We agree to keep our agreements alive
- ❖ We agree to stay updated on strategic priorities at board meetings
- ❖ We agree to revisit our commitment and needs as a board
- ❖ We agree to meet with unique stakeholders
- ❖ We agree to increase our local and statewide advocacy via resolution or proclamation
- ❖ We agree to communicate requests to the Superintendent for appropriate delegation to staff

The Best of Us

A. You get the best of me when ...

- You allow me to ask questions and dive deeper (Kandice)
- Your intention is to understand my perspective even if you disagree (Bibiana)
- We operate from a position of mutual trust (Jake)
- We use our time productively (Morgan)
- You show me instead of tell me (Morgan)
- We treat each other as equals (Deborah)
- I have read my entire packet (Rogelio)
- I am rested (Rogelio)
- I have all the information I need to make the best possible decision (Rogelio)
- I get feedback on how I can improve (Rogelio)

- I am aware of all the variables or as many as possible (Rogelio)
- I hear from as many stakeholders as possible (Rogelio)
- Youth voice is included (Rogelio)
- I am able to use the contributions of others and observations to create my opinions (Noel)

B. You miss out on the best of me when ...

- You over-explain (Kandice)
- You try to minimize my or anyone's opinion (Bibiana)
- I don't feel I can express my thoughts freely (Jake)
- I feel that trustees are not approaching things with an open mind (Jake)
- We go backwards or in circles with our discussions (Morgan)
- I feel that I am not given the credit for my expertise in solid answers (Deborah)
- I am not prepared (Rogelio)
- I am tired (Rogelio)
- I am not aware of all the variables or as many as possible (Rogelio)
- Youth voice is not included (Rogelio)
- Others assume I am working toward a particular agenda instead of working toward a better understanding (Noel)

C. You can count on me to ...

- Ask questions (Kandice)
- Collaborate for the same goal and for the best of our students (Bibiana)
- Center the conversation in order to keep things on track (Jake)
- Be prepared (Morgan)
- Reach out to my contacts for help (Deborah)
- Build relationships (Deborah)
- Be a hard worker and help find solid solutions (Deborah)
- Be prepared (Rogelio)
- Listen attentively (Rogelio)
- Ask critical questions (Rogelio)
- Be ready (Rogelio)
- Build partnerships (Rogelio)
- Be open to learning from others (Rogelio)
- Be open to the opinions of others (Rogelio)
- Get things done (Rogelio)
- Be honest and to strive to find the truth of a matter (Noel)

D. This is what I need from you ...

- Patience (Kandice)
- To work as a team, to be human, and to respect each other's opinions (Bibiana)
- To foster an environment of mutual respect and trust (Jake)
- To be concise and get to the point (Morgan)
- To have an open mind (Morgan)
- An opportunity to get to know each other (Deborah)
- To pay attention during meetings and do not ask questions that have already been asked (Deborah)

- Be prepared (Rogelio)
- Ask questions (Rogelio)
- Give me feedback (Rogelio)
- Bring goodwill and the preparation necessary to find solutions based squarely on what is in the best interest of the students (Noel)

Welcoming New Members

- A. The **Board President** and/or the **Superintendent** will meet with each newly elected or appointed member to:
- Provide a copy of the Governance Handbook
 - Provide the schedule of meetings
 - Explain the format for meetings
 - Review the Governance Handbook, and
 - Outline the process for completing and submitting the Statements of Economic Interests - FORM 700
- B. The **Superintendent** or designee shall, in addition to the above:
- Provide an overview of the district
 - Introduce cabinet members who will be communicating with the board and outline support by the executive assistants
 - Provide information about stipends, health benefits, trustee budgets, and travel expenses
 - Provide information on the Brown Act, and
 - Offer new members professional development opportunities as needed or as available (CSBA conference, new board member workshop, Masters in Governance workshops, etc.).
- C. The **Board** will review the Governance Handbook
- An agenda item will be scheduled in January (after the election) to review governance team agreements and processes (the Governance Handbook) and to quickly involve new members.

Annual Organizational Meeting

The annual organizational meeting will be held in December according to current law.

At this meeting, the Board shall

- Elect a Clerk, Vice President and President from its members
- Establish the regular school board meeting dates and starting/ending times for the year
- Appoint representatives to specific organizations and committees, and
- Determine locations of board meetings.

Speaking With a Common Voice

All public statements in the name of the board are made by the board president, or if appropriate, by the superintendent or designee.

When speaking to community groups, the media, or to the public, individual board members have a responsibility to identify personal viewpoints as such and not as the viewpoint of the board.

When a board decision has been reached, all board members are encouraged to abide by that decision until it is amended or rescinded by board action. Any board member who may wish to criticize or oppose any specific board action should do so in an open board meeting.

Assigning Work to Staff

No individual member of the board, by virtue of holding office, shall exercise any administrative responsibility with respect to the schools; nor as an individual, command the services of any employee.

Board members are to channel their requests and/or concerns directly to the superintendent. If a trustee has a concern about the Superintendent, then they should channel their concern directly to the Board President.

Addressing Conflict Among Board Members

Because the governance team norms are designed to create an open, respectful, collaborative culture, members will engage in dialogue while welcoming an open discussion with different points of view.

Members will demonstrate an ability to disagree on issues without taking the disagreements personally.

Members will endeavor to maintain neutral body language, facial expressions, and tone during deliberations.

School Visitations

School visitations are encouraged to build an understanding of the district's instructional programs, curriculum, and staff. Each semester, the superintendent's office will coordinate a series of school site visits.

Should the school site visitation schedule not meet the needs/ desires of the board member, board members should work with the executive assistants to schedule a campus visit at another time.

During visits, members should be cautious of interrupting the learning environment or taking up too much time of the site administrator or staff.

Board Meetings

Placing Items on Board Agendas

Board members may request to place any item on the agenda during the **TRUSTEE REQUESTS FOR FUTURE AGENDA ITEMS** section of the Board meeting.

Developing Board Meeting Agendas

The President, Vice-president, and Clerk will meet with the Superintendent to develop the agenda for each board meeting.

Having Questions Related to the Agenda Answered Prior to a Board Meeting

If an individual board member has questions related to an agenda or requires further information, an email should be sent to the Superintendent. The Superintendent will delegate the request to a staff member and a response will be generated as soon as possible. The response will be provided to all trustees.

The Role of Board Members During Board Meetings

The authority of the Board to approve or disapprove actions rests solely with the full board (or at least a quorum) during properly noticed public board meetings. A majority vote provides direction to the superintendent and staff. By carefully reviewing the board packet prior to the board meeting, board members can be prepared to fully participate in the meeting. All members share a common responsibility to ensure the Brown Act is followed.

The Role of Board President (BB 9121)

The president shall preside at all Board meetings. They shall:

1. Call the meeting to order at the appointed time
2. Announce the business to come before the Board in its proper order
3. Enforce the Board's policies relating to the conduct of meetings and help ensure compliance with applicable requirements of the Brown Act
4. Recognize persons who desire to speak, and protect the speaker who has the floor from disturbance or interference
5. Explain what the effect of a motion would be if it is not clear to every member
6. Restrict discussion to the question when a motion is before the Board
7. Rule on issues of parliamentary procedure
8. Put motions to a vote, and state clearly the results of the vote
9. Be responsible for the orderly conduct of all Board meetings

The president shall perform other duties in accordance with law and Board policy including, but not limited to:

1. Signing all instruments, acts and orders necessary to carry out state requirements and the will of the Board
2. Consulting with the Superintendent or designee on the preparation of the Board's agendas
3. Working with the Superintendent to ensure that Board members have necessary materials and information
4. Subject to Board approval, appointing and dissolving all committees
5. Calling such meetings of the Board as they may deem necessary, giving notice as prescribed by law
6. Representing the district as governance spokesperson, in conjunction with the Superintendent

The president shall have the same rights as other members of the Board, including the right to move, second, discuss and vote on all questions before the Board. It is a best practice when presenting a report to the public to be concise and not take too long.

Board Meeting Parliamentary Procedure

The Board meetings will be conducted using Robert's Rules of Order. The main usage of the procedures will be to introduce board action as listed below:

HOW TO INTRODUCE NEW BUSINESS – The Main Motion Process

Step 1

- Member makes a clearly worded motion to take action or a position.
- "I move..."
- Motions recorded in minutes

Step 2

- Motion must be seconded.
- "Second!"
- A second allows discussion to occur; it does not signify approval.
- A motion without a second does not move forward.

Step 3

- Chairman restates the motion.
- "It is moved and seconded that..."
- Provides clarity

Step 4

- Discussion/debate occurs.
- Maker of motion starts the discussion.
- Amendments may be offered - return to step 1 to amend motion: "I move to amend the motion by..."

Step 5

- Chair closes discussion and states the question/asks for a vote.
- "The question is on the adoption of the motion that..."
- Motion repeated word-for-word

Step 6

- Chairman provides voting directions:
- "Those in favor of the motion, say aye";
- "Those opposed, say no"

Step 7

- Chairman announces the result of the vote:
- "The ayes have it, and the motion is adopted" or
- "The noes have it, the motion is lost."
- Recorded in minutes

Some basic principles of Robert's Rules of Order are:

- ✓ All members have equal rights, privileges, and obligations
- ✓ No person can speak until recognized by the chair
- ✓ Only one question at a time may be considered, and only one person may have the floor at any one time
- ✓ Members have a right to know what the immediately pending question is and to have it restated before a vote is taken
- ✓ Full and free discussion of every main motion is a basic right
- ✓ A quorum must be present for business to be conducted

Board Member Reports at a Board Meeting

On the agenda, there is time for board members, at their election, to provide a report. The intent of this agenda item is for individual trustees to report on activities that they have undertaken related to activities or events throughout the district.

Individual Board Member's Request for Information, Materials, or Action

It is important for trustees to be well informed, as oversight of the district is one of the main functions of the board. Trustees recognize that they have no power as individuals to direct staff actions, and that compiling information in response to trustee requests can take staff away from their day-to-day operations of schools and the district.

An individual board member will—insofar as possible—work to let the superintendent and staff know ahead of time when a request for information will be made in a public meeting so the staff can be prepared to provide a thorough response. Staff will make every effort to ensure that board agenda items include thorough background and information.

General requests for information, not associated with a board agenda item, should be made directly to the superintendent. The Superintendent will review the request, along with the Executive Cabinet, and determine how to proceed with the request. A best practice is that trustees should self-regulate the amount of requests for information regarding issues not on the board agenda.

Board Meeting Guidelines

It is important to recognize that a board meeting is the time for the board to do their work in public view. After staff input and public comment, board members are encouraged to ask questions and explain their thinking related to the topic at hand. The board president recognizes members who desire to speak, alternating so that all members have the opportunity to speak. There is not a time limit or limit to the number of questions or comments that a board member may make, but each board member should be respectful of giving other members the opportunity to speak. Nothing in this section will preclude members from speaking multiple times until all discussion is concluded.

Unless a point is important to further understanding of the immediate discussion, the board president will allow all other members to speak first and then add their comments or questions.

Public Comments During a Board Meeting

Members of the public shall have an opportunity to address the board on any item of interest that is within the subject matter jurisdiction of the board (Education Code section 35145.4, Government Code section 54954.3). If the public comments on items not appearing on the posted board agenda, the board cannot take action or discuss the comments (Government Code section 54954.2), other than to briefly acknowledge the comments and, if desired, to ask staff for follow up information.

<p>The Board should understand that a regular meeting of the Board is a meeting that is designed to be conducted in front of a public audience. <u>Regular meetings are not designed as open-ended community forums or town hall meetings.</u></p>
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In order to conduct district 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 on any item of interest to the public that is within the subject matter jurisdiction of the Board. Comments are limited to 3 minutes per speaker and 20 minutes per topic.

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.

2. Comments pertaining to items not on the agenda will be made during the Public Comment section of the board agenda. The Board shall take no action or discussion on any item not appearing on the posted agenda, except as authorized by law.

3. Comments related to items on the agenda may be made during the Public Comment section or at the time the item is addressed during the meeting. If public comments are made at the time the item is considered, the Board President will open the public comment time, allow public comments, and then close the public comment time.

4. 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.

Voting

A majority vote of all members of the board is necessary for the election of officers or any other action by the board unless otherwise specified by law. Voting shall be by voice and the board Executive Assistant records the votes by members which are placed into the minutes of the meeting.

Unless otherwise provided by law, affirmative votes by a majority of the board's membership are required to approve any action under consideration, regardless of the number of members present.

The board shall take no action outside of a public meeting except on those matters and under those conditions authorized for closed sessions.

Voting No, Abstaining, or Recusal

Each trustee respects the right of other trustees to vote "no" on an issue. Everyone agrees it is a courtesy to the governance team to explain the reasons for the "no" vote either during deliberation or before casting the vote, however, an explanation is not required.

Abstention is a term that indicates a trustee is present during the vote but does not cast a vote. A person may abstain when they do not feel adequately informed about the issue at hand or has not participated in relevant discussion. If a member is absent at the previous meeting, they may abstain from voting on the approval of that meeting's minutes.

A member may be required to recuse themselves in the case of a real or perceived conflict of interest.

If recusal on a vote is related to an actual or perceived conflict of interest, the recusal shall be announced at the time the topic is first brought up and shall be based on one of the following: 1) the matter affects a close relative of the board member (Education Code section 35707); 2) the vote is to replace the board member's position on the board (Education Code section 35178); or 3) "remote interests" as listed in Government Code section 1091.

Quorum

A quorum is the minimum number of voting members who must be present at a properly called board meeting in order to conduct business in the name of the board, and is established when a majority of the board members (at least four of the filled positions) are in attendance (Education Code section 35164, Board Bylaw 9323).

Additional Board Information

Board-appointed Committees

Board members serve as the conduit between District committees and the board as a whole. Board members are not voting members of board-appointed committees.

If a board member wants to attend a board-appointed committee meeting of which they are not the board liaison, the board member should notify the board Executive Assistant. This will eliminate the possibility of four or more board members being in attendance at the meeting.

Periodically, board members appointed to serve on committees will provide an update to the board as a whole during a regularly scheduled meeting.

Electronic Media/ Communication Among Governance Team Members

The Board of Trustees will use electronic media (e.g., email and texting) carefully to ensure that there is no violation of the Brown Act (Government Code sections 54950-54962). The Brown Act prohibits a majority of board members from exchanging information outside of a board meeting to:

- ❖ develop collective concurrence,
- ❖ advance or clarify an issue,
- ❖ facilitate agreement or compromise, or
- ❖ advance an ultimate resolution.
- ❖ The board recognizes that by using "Reply All" in email responses, the email becomes part of the deliberative process, creates a public record, and limits the opportunity for any other board member to have a conversation on a topic.

Board members will be aware of and follow district policy as it pertains to electronic communication. The district is subject to requests for public documents as provided by the California Public Records Act (Government Code section 6250 et seq.). Public documents include emails and other correspondence from board members as well as from employees.

Complaints From Community/Staff

When an issue is brought to a board member, the board member will use active listening to hear what the complaint or issue is. Board members need to remain cognizant of their responsibility for **judicial review**, staff and student **confidentiality**, and **due process** when talking with the complainant.

1. *Receive* the information (listen).
2. *Restate* what the complainant has said to ensure that you have heard the information correctly.
3. *Ask* the person what they would like the board member to do with the information and what the individual would like to see as a possible solution.
4. *Clarify* that as an individual board member, you have no authority to fix a problem or concern. Use the statement: ***“This problem/concern could end up requiring board action, and if I am involved in it at this level, I will be unable to act on it as a member of the board because it could be a violation of due process. I will make sure it goes through the proper channels.”***
5. *Thank* the complainant for sharing their concerns.
6. *Explain* that you will be sharing the information with the superintendent or redirect the complainant to communicate with appropriate personnel and utilize the appropriate complaint procedure.
7. *Ask* the individual to follow up if the problem isn’t resolved.

Conflict of Interest (BP 9270)

Common Law Doctrine generally prohibits a board member from appointing, promoting, or recommending for appointment any “relative” or member of the household of the board member to any position, department, or committee over which the official exercises authority or control.

As a point of clarification for family members or relatives wishing to serve on committees:

1. If the committee provides a recommendation directly to the Board, then no board members may serve on the committee. On the contrary, if the committee reports directly to staff, then a board member may serve on the committee if selected by the staff member managing the committee.
2. There should be no committees, whether reporting directly to the Board or directly to staff, which have both a board member and relative of a board member participating on the committee.
3. A family member or relative of a board member will not be allowed to serve on a committee for which a board member would not be allowed to serve. The purpose of this clarification is to reduce or eliminate the perception that a conflict of interest might impact the committee’s work.

When a common law conflict of interest is found to exist, the appropriate remedy is for the affected official to remove themselves from “taking any part in the discussion and vote” regarding the particular matter. (70 Ops.Cal.Atty.Gen. 45 (1987).)

Exactly what constitutes a personal or noneconomic conflict of interest that requires the public official to recuse themselves is not precisely defined and is ultimately subject to factual analysis on a case-by-case basis. However, if members of the public or other employees might believe that a Board member’s participation and/or decision is influenced by the Board member’s “relative”, the appearance of

impropriety is implicated. As public officials, Board members should always avoid any appearance of impropriety in the Board's action and the Board member's participation in those decisions.

When a common law conflict of interest or the appearance of impropriety is implicated, the affected Board member shall publicly identify the relationship causing the potential conflict, and abstain and not participate in any discussions about, deliberation and any votes regarding the subject giving rise to the potential conflict.

Role as a Judicial Body

As a result of labor law or collective bargaining agreements, the Board of Trustees may serve as a judicial or appeals body to hear cases and/ or review decisions that have already been heard by staff. Because of this function, it is imperative that individual trustees do not get involved in personnel matters or complaints prior to performing their judiciary responsibility. If a trustee is involved at an earlier stage of the process, a conflict of interest may be implicated. To avoid a possible conflict of interest, trustees should refer personnel matters or complaints to the appropriate staff.

Electioneering

Generally, the governing board of a school district or individual trustees are empowered to provide voters with relevant facts and to aid them in reaching an informed decision when voting on a political issue such as school facility bonds or vacant trustee seats. A school district nor an individual board member may expend funds or use resources to promote for one side or the other on a political position.

Trustees may not use school district resources, funds, or equipment to create advertisements or promotional material, such as bumper stickers, signs, and buttons. Trustees may not instruct or allow school district employees to campaign on behalf of a political issue during a paid working day. Trustees may not distribute campaign literature using school resources, such as email lists, or other facilities.

Some common electioneering questions/ answers:

Posting Signs and Promotional Materials

Q: May a trustee post political messages to the employee bulletin board?

A: "No." Brochures and tangible material may not be posted to employee bulletin boards if it advocates for or against a ballot measure or candidate.

Q: May trustees wear buttons featuring political messages during the workday, at school events?

A: "Yes" but with limits. As a matter of free speech, so long as any button or apparel does not disrupt education, public employees are allowed to wear buttons featuring political messages during the school day or at school events. However, individuals are cautioned against advocating for or against a political issue during the working school day or at a properly noticed school board meeting.

Endorsement, Advertising, and Public Presentations

Q: May district employees and board members endorse initiatives and/or candidates?

A: "Yes," so long as it occurs after work, not on school grounds, and does not involve any school resources. Employees and board members may NOT endorse initiatives or candidates when

speaking in their official capacity. However, as private citizens, each individual is entitled to advocate freely. Despite this limitation, a Board may vote, during a properly noticed board meeting, to support or oppose a ballot measure that may affect the agency. The district resources used to prepare the resolution, place it on the agenda and time to debate it, etc., are not considered an improper expenditure of district resources. [See Choice-in-Education League et al, Plaintiffs and Respondents, v. LAUSD et al, 17 Cal. App. 4th 415 (1993)]

Q: Can the board legally direct the superintendent and staff to remain silent on a matter before the voters?

A: "No." The Board may not instruct school district employees on how they might act as private citizens when not on "work time." The Board may, however, set guidelines for conduct during the workday.

Q: May a candidate or campaign committee purchase space in a school district publication?

A: "Yes," so long as the forum is available to all sides on an equitable basis, a school district publication may be used. However, the use of a publication for campaign purposes must not constitute the use of district resources, and must be compensated accordingly. Further, by allowing a candidate to purchase space, the District must allow all sides of a campaign to participate, effectively opening the doors for any number of unforeseen voices. We would recommend against permitting the purchase of space in a school district publication for political reasons.

Q: May members of the public speak to an election topic/candidate during the public comments section of a general board meeting?

A: "Yes." The public is entitled to speak during the public comments section of a board meeting on an election topic/candidate. The Board should refrain from responding to any comments made during the public comments section of the meeting that would constitute advocacy for one side or the other.

Accord:

The Board of Trustees of the Woodland Joint Unified School District will strive to adhere to the processes and procedures included within this handbook.

Trustees will also endeavor to:

➤ **Be Impeccable With Their Word**

In essence, this agreement focuses on the significance of speaking with integrity and carefully choosing words before saying them aloud.

➤ **Not Take Anything Personally**

This agreement provides trustees with a way to advocate the importance of having a strong sense of self and not needing to rely on the opinions of others in order to be content and satisfied with their self-image.

➤ **Not Make Assumptions**

When one assumes what others are thinking, it can create stress and interpersonal conflict because the person believes their assumption is a representation of the truth.

➤ **Always Do Their Best**

This agreement entails integrating the first three agreements into boardsmanship and also serving the community to one's full potential.

Trustee Whitaker Signature

Date

Trustee Villagrana Signature

Date

Trustee Bautista Zavala Signature

Date

Trustee Rodriguez Signature

Date

Trustee Garcia Signature

Date

Trustee Richardson Fowler Signature

Date

Trustee Childers Signature

Date

Board Do's and Don'ts of HR

The Board of Trustees does have a limited set of roles and responsibilities related to human resources. However, the management and compliance of the human resources processes and procedures is completed by the administrative staff.

General Roles and Responsibilities in Human Resources:

1. Employing and evaluating the Superintendent.
2. Setting parameters for negotiations.
3. Ratifying collective bargaining agreements.
4. Establishing a legal and compliant framework for hiring staff.
5. Ratifying personnel recommendations.
6. Serving as a judicial review or appeals body for personnel issues.

General Human Resources Expectations/ Norms

1. Individual trustees will refrain from involvement in personnel matters.
2. The Board will focus on work as a Board and not interfere with the day-to-day operations of the school system (which includes personnel management).
3. No individual member of the Board shall exercise any administrative responsibility.
4. No individual member of the Board shall command the service of any employee except the Superintendent.
5. Individual board members have no power to direct staff actions.
6. Complaints or concerns about staff will be redirected to the Superintendent or appropriate administrator.

Best Practices

- Don't get involved in managing, interpreting, or implementing any part of the collective bargaining agreements with our employees. Do refer an employee to their union representative or HR.
- Don't get involved with complaints about working conditions or directives from a supervisor. Do refer any employee that approaches you about working conditions either to HR or their union representative.
- Don't get involved in anything related to contract language. Do refer an employee to their union representative as language disputes are handled through the grievance process and do not involve board members.

Executive Assistant Support

The Board of Trustees is supported by the Superintendent's Office staff. Noemi Morones (full-time) and Maribeth Villalobos (part-time) not only support the Superintendent, but also support the Board of Trustees. Below is a list of activities and functions, which Noemi and Maribeth perform in support of the Board of Trustees:

General Support

- Provide weekly newspaper articles related to WJUSD.
- Compile a list of upcoming activities throughout the district to be published in the Friday Facts.
- Coordinate ticket purchase and distribution for local events.
- Manage all aspects of the development of the board meeting agenda.
- Provide emergency notification when notified of activities within the district requiring first responders.
- Respond to emails from trustees, specifically requests for general information.

Conference/ Travel Support

- Provide trustees with conference registration, travel arrangements, scheduling, and reimbursement support for board travel or attendance at conferences or professional development event.

Miscellaneous Support

- Ordering supplies/ manage the Board budget
- Coordinates school site visits
- Conducts Board polls
- Schedules meeting with the Superintendent
- Schedules rooms at the district office for individual trustees needing meeting space
- Manages the resolution/ recognition process prior to board meetings

Governance Team's Strengths, Talents, and Abilities

StrengthsFinder Matrix: Governance Team

	Executing								Influencing							Relationship Building							Strategic Thinking													
	achiever	arranger	belief	consistency	deliberative	discipline	focus	responsibility	restorative	activator	command	communication	competition	maximizer	self-assurance	significance	woo	adaptability	connectedness	developer	empathy	harmony	includer	individualization	positivity	relator	analytical	context	futuristic	ideation	input	intellection	learner	strategic		
Elodia																																				
Jake																																				
Rogelio																																				
Deborah																																				
Morgan																																				
Bibiana																																				
Kandice																																				
Noel																																				

Working with Others Who Have:

Strengths

Achiever -

- Establish a relationship with this person by working alongside them. Working hard together is often a bonding experience for them. Is annoyed by "slackers."
- Recognize that this person likes to be busy. Sitting in meetings is likely to be very boring for them. So only invite them to meetings where you really need them and they can be fully engaged. If they don't need to be at the meeting, let them get their work done instead.
- This person may well need less sleep and gets up earlier than others. Look to them when these conditions are required on the job. Also, ask them questions such as "How late did you have to work to get this done?" or "When did you come in this morning?" They will appreciate this kind of attention.

Activator -

- Tell this person that you know she is someone who can make things happen and that you may be asking her for help at key times. Your expectations will energize them.
- When this person complains, listen carefully - you may learn something. Then get them on your side by talking about new initiatives that they can lead or new improvements that they can make. Do this immediately, because unchecked, they can quickly stir up negativity when they get off track.
- Ask this person what new goals or improvements your team needs to achieve. Then help them to see what steps they can take to start making progress toward these goals.

Adaptability -

- This person's instinctively flexible nature makes them a valuable addition to almost any team. When plans go awry, they will adjust to the new circumstances and try to make progress. They will not sit on the sidelines and sulk.
- With this person's willingness to "go with the flow" they can provide a wonderful environment in which others can experiment and learn.
- This person will be most productive on short-term assignments that require immediate action. They prefer a life filled with many quick skirmishes rather than long, drawn-out campaigns.

Analytical -

- Whenever this person is involved with an important decision, take time to think through the issues with them. They will want to know all the key factors involved.
- When you are defending a decision or a principle, show this person the supporting numbers. They instinctively give more credibility to information that displays numbers.
- Because accuracy is so important to this person, getting a task done correctly may be more important to them than meeting a deadline. Therefore, as the deadline draws near, keep checking in with her to make sure that she has the necessary time to do the job right.

Arranger -

- This person is excited by complex, multifaceted assignments. They will thrive in situations in which they have many things going on at the same time.
- When you are launching a project, ask this person for help in positioning the members of the project team. They are good at figuring out how each person's strengths might add greatest value to the team.
- This person can be resourceful. Feel confident that if something is not working, they will enjoy figuring out other ways of doing things.

Belief -

- This person is likely to be very passionate about the things closest to their heart. Discover that passion and help them connect it to the work they have to do.
- Learn about this person's family and community. They will have made rock-solid commitments to them. Understand, appreciate and honor these commitments and they will respect you for it.
- You do not have to share this person's belief system, but you do have to understand it, respect it, and apply it. Otherwise, major conflicts will eventually erupt.

Working with Others Who Have:

Strengths

Command -

- Always ask this person for evaluations of what's happening in your organization. They are likely to give you a straight answer. In the same vein, look to them to raise ideas that are different from your own. They aren't likely to be a head-nodder.
- When you need to jar a project loose and get things moving again, or when people need to be persuaded, look to this person to take charge.
- Never threaten this person unless you are 100% ready to follow through.

Communication -

- This person finds it easy to carry on a conversation. Ask them to come to social gatherings, dinners, or any events where you want to entertain prospects or customers.
- Take the time to hear about this person's life and experiences. They will enjoy telling you, and you will enjoy listening. And your relationship will be closer because of it.
- Discuss plans for your organizations social events with this person. They are likely to have good ideas both for entertainment and for what should be communicated at the event.

Competition -

- Use competitive language with this person. It is a win-lose world for them, so from his perspective, achieving a goal is winning and missing a goal is losing.
- Help this person find places where they can win. If they lose repeatedly they may stop playing. Remember, in the contests that matter to them, they don't compete for the fun of it. They compete to win.
- When this person loses, they may need to mourn for a while. Let them. Then help them quickly move into another opportunity to win.

Connectedness -

- This person will likely have social issues that they will defend strongly. Listen closely to know what inspires this passion in her. Your acceptance of these issues will influence the depth of the relationship you can build with them.
- Encourage this person to build bridges to the different groups in the organization. They naturally think about how things are connected, so they should excel at showing different people how each relies on the others.
- If you also have dominant connectedness talents, share articles, writing and experiences with this person. You can reinforce each other's focus.

Consistency -

- Be supportive of this person during times of great change because they are most comfortable with predictable patterns that they know works well.
- This person has a practical bent and thus will tend to prefer getting tasks accomplished and decision made rather than doing more abstract work such as brainstorming or long-range planning.
- When it comes time to recognize others after the completion of a project, ask this person to pinpoint everyone's contributions. They will make sure that each person receives the accolades he or she truly deserves.

Context -

- During meetings, always turn to this person to review what's been done and what's been learned. Instinctively they will want others to be aware of the context of decision making.
- This person thinks in terms of case studies: "When did we face a similar situation? What did we do? What happened? What did we learn?" You can expect them to use this talent to help others learn, especially when the need for anecdotes and illustration is important.
- When you introduce this person to new colleagues, ask them to talk about their backgrounds before you get down to business.

Deliberative -

- Ask this person to join teams or groups that tend to be impulsive. They will have a temporizing effect, adding much needed thoughtfulness and anticipation to the mix.
- This person is likely to be a rigorous thinker. Before you make a decision, ask them to help you identify the land mines that may derail your plans.
- Respect the fact that this person may be private. Unless invited, do not push to become too familiar with them too quickly. And by the same token, don't take it personally if they keep you at arm's length.

Developer -

- Reinforce this person's self-concept as someone who encourages people to stretch and to excel. For example, tell them "They would never have broken the record by themselves. Your encouragement and confidence gave them the spark they needed."
- Look to this person when it is time to recognize your coworkers. They will enjoy selecting the achievements that deserve praise, and these colleagues on the receiving end will know that the praise is genuine.
- Ask this person to help you grow in your job. They are likely to pick up small increments of progress that others miss.

Discipline -

- When working on a project with this person, make sure to give them advance notice of deadlines. They feel a need to get work done ahead of schedule and can't do this if you don't tell them the timelines.
- Try not to surprise this person with sudden changes in plans and priorities. The unexpected is distressing to them. It can ruin their day.
- Disorganization will annoy this person. Don't expect them to last long in a physically cluttered environment.

Empathy -

- Ask this person to help you understand how certain people in your organization are feeling. They are sensitive to the emotions of others.
- Before securing this person's commitment to a particular course of action, ask them how they feel and how other people feel about the issues involved. For them, emotions are as real as other more practical factors and must be weighted when making decisions.
- When employees or customers have difficulty understanding why an action is necessary, ask this person for help. They may be able to sense what they are missing.

Focus -

- When there are projects with critical deadlines, try to involve this person. They instinctively honor timelines and commitments. As soon as they own a project with a deadline, they concentrate all their energies on it until it is completed.
- Be aware that unstructured meetings will bother this person. So when they are present at a meeting, try to follow the agenda.
- Don't expect this person to always be sensitive to the feelings of others because getting their work done often takes priority over people's sensitivities.

Futuristic -

- Keep in mind that this person lives for the future. Ask them to share their vision with you -their vision about their career, about your organization and about the marketplace or field in general.
- Stimulate this person by talking with them often about what could be. Ask lots of questions. Push them to make the future they see as vivid as possible.
- Send this person any data or articles you spot that would be of interest to them. They need grist for their futuristic mill.

Working with Others Who Have:

Strengths

Harmony -

- Steer this person as far as possible away from conflict. Try not to invite this person to meetings where there will almost certainly be arguments, because they are not at their best when confronting others.
- Don't waste your time discussing controversial subjects with this person. They will not enjoy debate for its own sake. Instead, keep your discussion focused on practical matters about which clear action can be taken.
- When others are locked in disagreement, this person can help unlock them. They will not necessarily resolve the subject under debate, but they will help people find other areas where they agree. This common ground can be the starting point for working productive together.

Ideation -

- This person enjoys the power of words. Whenever you come across a word combination that perfectly captures a concept, idea, or pattern, share it with them. It will stimulate their thinking.
- This person will be particularly effective as a designer, whether of sales strategies, marketing campaigns, customer service solutions or new products. Whenever possible, try to make the most of their ability to create.
- Try to feed this person new ideas; they thrive on them. They will not only be more excited about their work, but they will also use these new concepts to generate new insights and discoveries of their own.

Includer -

- When you have group functions, ask this person to help ensure that everyone is included. They will work hard to see that no individual or group is overlooked.
- Ask this person to help you think about potential customers, markets or opportunities you are not reaching today.
- If you are not a "natural" in social settings, stay close to an Includer. They will make sure you are a part of the conversation.

Individualization -

- When you are having difficulty understanding someone else's perspective, turn to this person for insight. They can show you the world through their eyes.
- If you want to learn more about your unique talents and how you stand out in a crowd, ask this person for their insights.
- Have a discussion with this person when you are having problems with a coworker. Their intuitions about the appropriate action for each individual will be sound.

Input -

- Keep this person posted on the latest news. They need to be in the know. Pass along books, articles and papers you think they would like to read.
- See if you can find a few common interests and then share facts and stories on these topics. This is often how great relationships begin.
- When you are in meetings, make a point of asking this person for information. Look for opportunities to leverage their abundant knowledge.

Intellection -

- Don't hesitate to challenge this person's thinking, they probably won't be threatened by this. On the contrary they should take it as a sign that you're paying attention to them.
- When you're faced with books, articles or proposals that need to be evaluated, ask this person to read them and let you know what they think. They love to read.
- Capitalize on the fact that thinking energizes this person. For example, when you need to explain why something has to be done, ask them to think it through and to help you uncover a detailed explanation.

Working with Others Who Have:

Strengths

Learner -

- Regardless of this person's role, he will be eager to learn new facts, skills or knowledge. Help them find new ways to learn and get motivated.
- Help this person track their learning progress by identifying milestones or levels that they have reached. Celebrate these achievements.
- Encourage this person to become the "master of trade" or "resident expert" in a specific area. This will feed their need for extreme competency.

Maximizer -

- This person is interested in taking something that works and figuring out ways to make the most of it. They may not be particularly interested in fixing things that are broken. If possible, avoid asking this person to do things that demand continual problem solving. Instead ask them for help when you need to uncover best practices.
- If you do not have someone around you who regularly focuses on your strengths, spend more time with a maximizer. They are naturally inquisitive about excellence and will help you hone in on what you do best.
- This person will expect you to understand her strengths and to value them for them. They will become frustrated if you spend too much time focusing on their weaknesses.

Positivity -

- This person brings drama and energy to the workplace. They will make your organization more positive and dynamic.
- The positivity theme doesn't imply that this person is always in a good mood. But it does imply that through his humor and attitude, they can make people more excited about their work. Remind them of this strength and encourage them to use it.
- Cynics will quickly sap this person's energy. Don't expect them to enjoy cheering up negative people. They will do better when asking to energize basically positive people who are simply in need of a spark.

Relator -

- This person enjoys developing genuine bonds with her colleagues. These relationships take time to build, so you must invest in them on a regular basis.
- Tell this person directly that you care about them. More than likely, this language will not sound inappropriate and will be welcomed by them. They organize their life around their close relationships, so they will want to know where they stand with you.
- Trust this person with confidential information. They are loyal, place a high value on trust and will not betray yours.

Responsibility -

- This person defines themselves by their ability to live up to their commitments. It will be intensely frustrating for them to work with people who don't.
- This person dislikes sacrificing quality for speed, so be careful not to rush them. In discussing their work, talk about its quality first.
- Help this person avoid taking on too much, particularly if they are lacking the discipline talents. Help them see that one more burden may result in their dropping the ball --- a notion they will loathe.

Restorative -

- Ask this person for their observations when you want to identify a problem within your organization. Their insights will be particularly acute.
- When a situation in your organization needs immediate improvement, turn to this person for help. They will not panic. Instead, they will respond in a focused, professional way.
- Offer your support when this person meets a particularly thorny problem. Because they define themselves by their ability to cope, they may well feel personally defeated if a problem remains unresolved. Help them through it.

Working with Others Who Have:

Strengths

Self-Assurance -

- If you are working on a team with this person, give them leeway in making decisions. They will neither want nor require hand-holding.
- Help this person understand that their decisions and actions do produce outcomes. They are most effective when they believe they are in control of their world. Highlight practices that work.
- Although this person's self-confidence can often prove useful, if they over claim or make some major misjudgments, be sure to point these out immediately. They need clear feedback to inform their instincts.

Significance -

- Be aware of this person's need for independence. If you do need to challenge them, understand that a confrontation may ensue.
- Acknowledge that this person thrives on meaningful recognition for their contributions. Give them room to maneuver, but never ignore them.
- Give this person the opportunity to stand out, to be known. They enjoy the pressure of being the focal point of attention.

Strategic -

- Involve this person in planning sessions. Ask them, "If this happened, what should we expect? If that happened, what should we expect?"
- Always give this person ample time to think through a situation before asking for their input. They aren't likely to voice their opinion until they have played out a couple of scenarios in their mind.
- When you hear or read of strategies that worked in your field, share them with this person. It will stimulate their thinking.

Woo -

- Help this person meet new people every day. She can put strangers at ease and help them feel comfortable with your organization.
- If you need to extend your own network, reach out to someone with strong Woo talents. They will help you broaden your own connections and get what you want.
- Understand that this person's values having a wide network of friends. If they are quick to meet and greet and then move on, do not take it personally.

How to Handle Complaints/ Personnel Matters

When an issue is brought to a board member, the board member will use active listening to hear what the complaint or issue is. Board members need to remain cognizant of their responsibility for **judicial review**, staff and student **confidentiality**, and **due process** when talking with the complainant. It is not a best practice when a board member tries to resolve the concern unless it is a matter of simply providing public information or pointing a community member to the right place or person.

General Best Practice When Listening to a Complaint/ Concern

- Receive** the information.
- Restate** what the complainant has said to ensure that you have heard the information correctly.
- Ask** the person what he/she would like you to do with the information and what they see as a possible solution.
- Clarify** that as an individual board member, you have no authority to fix a problem or concern. Use the statement (or something similar): “This problem/ concern may end up requiring board action, and if I am involved in it at this level, I will be unable to act on it as a member of the board because it could be a violation of due process. I will make sure it goes through the proper channels.”
- Thank** the complainant for sharing their concerns.
- Explain** that you will be sharing the information with the superintendent or redirect the complainant to communicate with appropriate personnel and utilize the appropriate complaint procedure.
- Ask** the individual to follow-up if the concern is not addressed.

Resources for Board Members

Websites

1. California School Boards Association (CSBA): <https://csba.org/>
2. California Department of Education (CDE): <https://www.cde.ca.gov/>
3. School Services of California (SSC): <https://www.sscal.com/>
4. Fiscal Crisis & Management Assistance Team (FCMAT): <https://www.fcmat.org/>
5. California Association of School Business Officials (CASBO): <https://www.casbo.org/>
6. California Latino School Boards Association (CLSBA): <http://www.clsba.org/>
7. California Association for Bilingual Education (CABE): <https://www.gocabe.org/>
8. California Association of African-American Superintendents and Administrators (CAAASA): <https://www.caaasa.org/>
9. Coalition for Adequate School Housing (CASH): <https://www.cashnet.org/>
10. The Brown Act – Resource from the Orange County Department of Education: <https://ocde.us/LegalServices/Documents/The-Brown-Act-California%27s-Open-Meeting-Law-January-2018.pdf>
11. EdSource: <https://edsources.org/>

Books

1. The Governance Core: School Boards, Superintendents, and Schools Working Together by Davis W. Campbell and Michael Fullan
2. How Not to Be a Terrible School Board Member: Lessons for School Administrators and Board Members by Richard E. Mayer
3. The School Board Member's Guidebook: Becoming a Difference Maker for Your District by Todd Whitaker and Ryan Donlan
4. Building Great School Board-Superintendent Teams: A Systematic Approach to Balancing Roles and Responsibilities by Bradley V. "Brad" Balch and Michael T. Adamson

Board Meeting Reflection Survey

Immediately after a board meeting, each board member will spend a few minutes evaluating the board's effectiveness. This information will be used to make suggestions for more efficient and focused meetings.

Board Meeting Reflection Survey	
Board Action	Select one:
The board meeting followed parliamentary procedures.	Yes/No/Usually
The meeting stuck to the agenda and was conducted in a businesslike manner.	Yes/No/Usually
Board members arrived on time.	Yes/No/Usually
The meeting started on time.	Yes/No/Usually
The meeting ended on time.	Yes/No/Usually
The board meeting lasted 2 hours or less.	Yes/No/Usually
Board members' absences from the meeting were minimal.	Yes/No/Usually
Board members arrived prepared to discuss business.	Yes/No/Usually
The meeting room was comfortable and conducive to discussion.	Yes/No/Usually
Discussions were polite and not dominated by one or two trustees.	Yes/No/Usually
Board members dealt with controversy properly and without acrimony.	Yes/No/Usually