New Board Member Orientation

Jefferson Union HSD Workforce Housing
@705 Serramonte Blvd, Daly City
January 21, 2023
WELCOME!
Agenda

9:00 - 9:15   Welcome & Introductions
9:15 - 9:45   A History Lesson on Education
9:45 - 10:15  The School Board/Superintendent Relationship
10:15 - 10:40 CSBA advocacy and SMCOE supports
10:40 - 11:00 Break with Mid-Morning Snacks
11:00 - 11:30 The ABCs of School Board Membership
11:30 - 12:00 Wrap-Up and SMCSBA Info
A History Lesson on Education

Kalimah Salahuddin, Jefferson Union High School District
Hector Camacho, San Mateo County Office of Education
The School Board/Superintendent Relationship

Toni Presta, Superintendent, Jefferson Union High School District
Board / Superintendent Relations

Effective school districts have superintendents and boards who function as a Governance Team.

- Relationship sets the tone for the district environment.
- Mutual respect and collaboration are key and they focus on the best interest of those they serve.

Strong Board/Superintendent Relationship

- Purposeful engagement
- Put time in
- Get to know each other
- Shared moral imperative
- Honest and open
Communication

- Timely and Consistent
- Clear, open, honest
- Superintendent keeps board members in the loop - hear from me first
- Friday Update (major events and issues from the week)
- Board / Superintendent meet regularly
  - Agenda planning, etc.
- Equal treatment
  - Answer all trustees when question is posed
- No Surprises - questions in advance of public meetings when possible
- Superintendent is only employ
- Brown Act
Govern Within Appropriate Roles

Board governs

- School board trustees represent the community. They create the district’s vision, form policies, and hire the superintendent.
- Boards are elected by the community to set priorities, establish policies and evaluate the outcomes of district operation.
- Boards have experience with the school district, as well as connections and responsibility to the community it represents.

Superintendent administers

- Superintendent brings the Board’s vision forward and serves as the chief administrative officer for the school district.
- Superintendent identifies needs, develops regulations, provides leadership and manages the day to day operation of the district.
Clarifying Roles

“Only the superintendent can manage the day-to-day operations of the district, and only the board can identify the expectations for the district through its policies. Boards that micromanage are working outside of their policy-making role. Superintendents who macro-manage are superseding the governance role of the board.

Roles of the board and superintendent need to be clarified through discussions of the expectations and responsibilities for various tasks. If there is disagreement about the process or responsibilities, take the time to discuss each participant’s perception of what has taken place in the past and what he or she thinks should take place in the future.”

(Association of Alaska School Boards)
Governance Handbook

**JUHSD Governance Handbook**

- Collaborative, trust based governance culture
- Agreements about how the team will conduct business together
CSBA Advocacy and
SMCOE Supports

Alisa MacAvoy, CSBA Region 5 Director
Nancy Magee, Superintendent, SMCOE
CSBA Overview

Alisa MacAvoy,
CSBA Region 5 Director
RCSD Board President
CA School Boards Association

Statewide Association for you!

- Membership of nearly 1000 school districts – 5000 school board trustees
- All SMC school districts members
- Represents the elected officials/school board trustees
- Essential voice of public education in CA
- Inspire members to be knowledgeable leaders, extraordinary governance practitioners and ardent advocates for all students
Organization

• CSBA Executive Leadership
• CSBA Board – Regional Directors and DALs
• Delegate Assembly
• CSBA Staff
• School Board Trustees
CSBA Supports

- Professional Development/Training
- Masters in Governance
- Annual Education Conference
- On-line training courses
- Webinars
- Newsletters

CSBA New Board Member Training (Virtual):
Jan 24-25 or Feb 14-15
$399/$424

- Effective governance
- Student learning and achievement
- Human resources
- School finance
CSBA Resources

- Board Policy Templates
- Policy Briefs
- Updates on Budget and High Priority Issues
- Sample Resolutions
- Governance support to school board members
- CSBA Website and Daily/Weekly emails
The Role of CSBA in Advocacy

- Advocate for State-wide issues using Policy Platform
- CSBA Legislative Staff
- CSBA Legislative Committee
- CSBA PACER – vacancy as of 01/23
- Grassroots Advocacy - YOU and local supporters
- CSBA email/text alerts

- State Legislative Action week (virtual) - March 14-16
- Federal Advocacy Coast to Coast - April 24-26
Thank you!
Break time
The ABCs of School Board Membership

Sophia Layne, President, Cabrillo Unified School District
Greg Land, President, San Mateo Union High School District
Sam Leinbach, Board Member, Belmont-Redwood Shores School District
Clayton Koo, former Board Member, Jefferson Elementary School District
Setting board meeting agendas

- Superintendent typically proposes draft agenda to board president for agreement; may utilize annual planning calendar.
- Meetings typically take place 1-2 times per month.
  - Open session - agenda/packets publicly posted in advance; typically include meeting opening/guidelines, agenda approval, communications, consent items, general business items for information/discussion/approval.
  - Closed session - restricted to legally allowable topics, e.g., student or personnel matters, litigation/legal matters, superintendent evaluation.
Budget - Sample financial planning cycle

- Adopted Budget and LCAP (22-23)
- Unaudited Actuals to CDE (21-22)
- Audit Report (21-22)
- Adopt Budget and LCAP (23-24)

**Calendar:**
- JUN
- JUL
- AUG
- SEP
- OCT
- NOV
- DEC
- JAN
- FEB
- MAR
- APR
- MAY
- JUN

- Estimated Actuals (21-22)
- 1st Interim July 1 - Oct 31 (22-23)
- 2nd Interim Budget Oct 31 – Jan 31 (22-23)
- Estimated Actuals (22-23)
Budget - Important Vocabulary to know

**State Budget Vocabulary**

- What is Prop 98? Prop 98 and minimum guarantee
- LCFF and LCAP … Local Control Funding Formula (LCFF) Revenue
- Basic Aid/Community Funded and Revenue Limit (LCFF)

**Your Budget**

- Assumptions
- Restricted vs. Unrestricted funds
- Reserves
- ADA or Average Daily Attendance
Budget - LCAP or LCFF District

General Fund Expenditures
- Employee Benefits: 21%
- Classified: 14%
- Capital Outlay: 1%
- Other Outlay: 4%
- Books & Supplies: 5%
- Services / Operating: 11%
- Certificated: 44%

General Fund Revenues
- Transfers: 13%
- LCFF: 95%
- State: 5%
- Local: 4%
Budget - Basic Aid or Community Funded District

**81% of Our Money Goes Directly to Students**

- Direct Instruction & Support, 81%
- Instruction, 63%
- Instructional Support, 11%
- Pupil Services, 7%
- Other Outgo, 1%
- Plant Services, 11%
- General Administration, 8%

Total Expenditures: $73,816,143

**Funding Sources**

- Parcel Tax 13%
- Federal/State 11%
- 89% of LASD funding comes from the local community

**81% of Our Money Goes Directly to Students**

- Direct Instruction & Support (81%)
- General Administration (8%)
- Plant Services (10%)
- Other Outgo (1%)
The Brown Act

- The Brown Act was enacted in 1953 after a 10-part exposé in the *San Francisco Chronicle* on the lack of transparency in local government, entitled “Your Secret Government”.

- Out of the series came a decision to push for a new state open meeting law. The League of California Cities drafted such a bill and Assembly Member Ralph M. Brown agreed to carry it. The Legislature passed the bill and it was signed into law in 1953.

- The Ralph M. Brown Act, known as the “Brown Act”, has evolved under a series of amendments and court decisions, and has been the model for other open meeting laws.
The Open Meeting Rule

- The Board’s business must be conducted in **PUBLIC**, with ample opportunity for public participation.
- The Brown Act applies to “legislative bodies” of all local agencies in California, e.g., councils, boards, commissions, and committees.
- Exception: ad hoc committees (other than standing committees) made up of less than a quorum of the body.
- A meeting occurs whenever a majority of the Board or Committee come together at the same time or place to discuss district business.
- This means:
  - 3 or more members of a 5-member board
  - 4 or more members of a 7-member board
Meetings

WHAT ISN’T A MEETING:

● Attendance of majority at
  ○ regional/state/national conference
  ○ local meeting open to the public
  ○ social, recreational, ceremonial event not sponsored by or for the body
● Are OK provided there is no collective discussion of school district business

UNLAWFUL “SERIAL MEETINGS”:

● “Chain” or “Daisy Chain” meetings: “A” talks to “B” who talks to “C,” who then talks to “D.” This can be 1:1, via text, email…
● “Hub-and-Spoke” meetings: A third party “X” is at the center of the communication. The board members never talk to each other; they all talk individually to “X.”
Meetings (cont.)

SOCIAL MEDIA:
● Can communicate to answer questions, provide information, or solicit information on district matters (in public forums)
● Cannot comment or ‘like’ other board member’s posts
● Stricter than in-person because even two members can’t discuss business

VIRTUAL MEETINGS:
● AB 2449 and permits meetings by teleconference (i.e. Zoom)
● Public must be able to attend and comment
● Other restrictions apply
Community Relations

School & District Community Relations

● You have MANY stakeholders as a Trustee
  ■ Teachers, Staff, Parents, Students, Organizations, Other Elected Officials & Constituents (aka voters)

● Understand that in the school setting, you are only ONE person and don’t speak on behalf of the whole board (unless at a Board meeting)

● Even if you want to, you unfortunately won’t be able to do everything for everyone
Community Relations

City, State & Federal Community Relations

● Your role as a Trustee is to be the district’s “cheerleader” - finding ways to build connections and open up opportunities for yourself and your District

● Don’t force yourself to get involved or participate if you don’t feel comfortable or ready to engage yet

● You always represent your district, regardless of what you do or do not do in the community
Upcoming Events

● General Membership Dinner Meeting – Educational equity: Addressing the implicit bias at the root:
  Monday, February 27, 6-8pm
  (Location TBA, registration invite coming soon!)
● General Meeting/Dinner. Topic: Working dinner to discuss what to ask legislators and collect priorities to advocate for our local schools. - March (Monday Dinner)
● Legislative Day - March (Saturday)
● Kent Awards - End of April. We will be recognizing last year’s winners as well as this year’s

● Mentorship Program
  ○ Contact Greg Layne or Sophia Layne
Thank you!