

## Escondido Union School District **Governance Handbook**

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Adopted March 7, 2024.

### Board of Trustees

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Frank Huston, *President*

Joan Gardner, *Vice President*

Doug Paulson, *Clerk*

Zesty Harper, *Trustee*

Mark Olson, *Trustee*

### Superintendent

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Luis Rankins-Ibarra, Ed. D

#### EFFECTIVE GOVERNANCE

##### Unity of Purpose, Roles, Responsibilities, Norms and Protocols

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

*On January 21, 2017, March 3, 2018, February 23, 2019, February 29, 2020, February 27, 2021, February 26, 2022, January 28, 2023, and February 3, 2024, the Escondido Union School District Board of Trustees and Superintendent participated in workshops on Effective Governance with the California School Boards Association. This document reflects the governance team’s discussions about developing and sustaining a framework for effective governance and includes highlights of their conversations about unity of purpose, roles, norms, and protocols that enable the governance team to continue to perform its responsibilities in a way that best serves all students.*

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## **UNITY OF PURPOSE**

*Unity of purpose is the common focus, overarching goals, and the core values, beliefs and principles governing body members share in common about children, the district and public education.*

### **UNITY OF PURPOSE**

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**What We Are Most Proud of about Our District:**

- Our focus on academic achievement
- The expansion of our enrichment programs which leads to academic achievement
- Our focus on the recovery of learning loss
- The Conway success
- That we are open to new delivery methods
- Our fiscal responsibility
- Our dedicated, supportive staff at all levels
- The alignment between the Governance Team and Executive Staff
- Our positive relationships with our employee groups
- The Mackenzie Scott donation – acknowledgement of our work and successes.
- The doors opening to us.
- Our positive messaging/marketing
- Our focus on school and staff safety
- That we are an All-star Board

### **UNITY OF PURPOSE**

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**What We Hope to Accomplish as a Team:**

- Maintain fiscal solvency.
- Enhance academic achievement
- Refocus on Math competency
- Prepare students for success at the next level and beyond
- Offer students a variety of academic and career choices which will help them to envision future possibilities.
- Provide Trade/CTE opportunities to students.

- Identify clear and concise success indicators that define student achievement and hold the Superintendent accountable for making progress.
- Reach proficiency at all levels.
- Maintain a fair and clear disciplinary line that is consistently enforced, with the recognition that the purpose of discipline is to teach and assist in changing behavior.
- Ensure safety and security for students and staff.

## UNITY OF PURPOSE

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### We Believe That a Strong Governance Team Is One That...

- Has members that listen to each other's views, allow discussion of issues, and come to a **full** understanding.
- Has members that respect each other's opinions and get along.
- Becomes single-minded.
- Works together for the common interest of **all** of our students and shares varying opinions respectfully while reaching consensus.
- Communicates well and keeps students as their focus.
- Keeps the final goal/product in mind.
- Works together with a common goal of student achievement and safety for **all** students.
- Keeps the district focused on its objectives.
- Is respectful of each other's viewpoints and roles.
- Focuses on their role and does not micro-manage.
- Assumes positive intent.

# Escondido Union School District

## Vision

The Escondido Union School District will actualize the unlimited potential of every learner. Each and every human being is empowered, encouraged, engaged, and committed.

## Mission

The Escondido Union School District, in partnership with our children, employees, parents, and community members, is committed to universal student achievement.

## Focus Goals

- **Student Achievement:** Provide a high quality and rigorous instructional program, which creates a foundation for future achievement for all students.
- **Positive Culture and Diversity:** Continue to build a collaborative culture, which promotes creativity, responsibility, and trust among all stakeholders, where diversity and equity are valued.
- **Safety and Security:** Ensure our students, staff, and all stakeholders are safe and secure in all environments.
- **Fiscal Solvency:** Remain fiscally solvent while being equitable to all stakeholders.

Adopted 3/14/19.

It begins  
with ME

# **GAINING CLARITY ON ROLES AND RESPONSIBILITIES**

## **The Role of the Board and Superintendent - CSBA:**

School board “trustees” are the representatives of the people, elected to ensure the district schools educate the children in consideration of the interests of the local community. The role of the school board is to govern the school district.

The superintendent is hired by the school board to provide the professional expertise in the day-to-day operations of the district. The role of the superintendent is:

1. To work with the school board to develop an effective governance leadership team.
2. To serve as the chief administrative officer for the school district.

## **Performing Board Responsibilities - CSBA:**

### **We Set the Direction for the community’s schools by:**

- Focusing on student learning.
- Assessing district needs.
- Generating, reviewing, and revising setting direction documents: (beliefs, vision, priorities, strategic goals, success indicators).
- Ensuring an appropriate inclusive process is used to develop these documents.
- Ensuring that these documents are the driving force for all district efforts.

### **We Establish an Effective and Efficient Structure for the school district by:**

- Employing the superintendent.
- Setting policy for hiring other personnel.
- Setting policies.
- Setting direction for and adopting the curriculum.
- Establishing budget priorities and adopting the budget.
- Overseeing facilities issues.
- Providing direction for and voting to accept collective bargaining agreements.

**We Provide Support through our behavior and actions by:**

- Acting with a professional demeanor that models the district's beliefs and vision.
- Making decisions and providing resources that support mutually agreed upon priorities and goals.
- Upholding board approved district policies.
- Ensuring a positive personnel climate exists.
- Being knowledgeable about district efforts and able to explain them to the public.

**We Ensure Accountability to the public by:**

- Evaluating the superintendent.
- Monitoring, reviewing, and revising policies.
- Serving as a judicial and appeals body.
- Monitoring student achievement and program effectiveness and requiring program changes as indicated.
- Monitoring and adjusting district finances.
- Reviewing facilities issues.
- Monitoring the collective bargaining process.

**We Act as Community Leaders by:**

- Speaking with a common voice about district priorities, goals, and issues.
  - Engaging and involving the community in district schools and activities.
  - Communicating clear information about policies, programs, and fiscal conditions of the district.
  - Educating the community and the media about issues facing the district and public education.
  - Advocating for children, district programs and public education to the general public, community, and local, state, and national leaders.
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## GAINING CLARITY ON ROLES AND RESPONSIBILITIES

### What Board Members Need from Each Other:

#### **The trustees can support each other by:**

- Respecting each other's opinions.
- When we have a problem, working it out privately and in a timely fashion.
- Giving praise when appropriate.
- Supporting decisions once the vote is taken.
- Keeping it professional; do not make it or take it personally.
- Not monopolizing the conversation.
- Assuming good intentions.
- Being open and honest about perceptions and feelings.
- Remembering that all electronic communications are subject to the Public Records and Brown Acts.
- Participating in agenda preparation when desired.

### What the Board Needs from the Superintendent:

#### **The superintendent will support trustees in fulfilling their responsibilities by:**

- Keeping us equally informed.
- Providing more content in the Friday Update in addition to the details on the day-to-day activities. The superintendent will develop a more robust big picture summation and analysis of the information provided by the various departments. It will contain higher level, more substantive information, and desired outcomes.
- Creating highlights for staff based on the information in the Friday Update.
- Providing timely updates on important topics, such as behavioral issues.
- Sending a text message telling us to check our emails on high profile items. Calling us regarding urgent matters.
- Creating a sign-up sheet for agenda preparation meetings.
- Ensuring that there are "no surprises."
- Providing more time for board input before final decisions are made - allowing the board ample opportunity to help refine a project/program while it is still in the formative stages.

- Further utilizing the information/discussion agenda items to allow the board time to study and discuss various topics.
- Providing the opportunity to frontload the goal development discussion and then providing updates.
- Developing elevator speeches/speaking points on hot topics and sharing them with all.
- Through his evaluation process, providing information on goals, established benchmarks and progress on achieving those benchmarks at the beginning, middle and end of each school year.
- Having cabinet members keep us equally informed.
- On controversial/hot topics having a two-step process – provide time for the board and community to digest issues.
- Providing background research/evidence on topics.
- Giving praise when appropriate.
- Updating us on new social media laws.

#### What the Superintendent Needs from the Board:

##### **The trustees can support the superintendent in fulfilling his responsibilities by:**

- Reading the Friday Updates.
- Giving him clear direction.
- Giving praise when appropriate.
- Giving feedback in an appropriate way.
- Giving him feedback on the information in the Friday Update and asking for more information, when needed.
- Contacting him or the appropriate cabinet member when you need more information or have a question. If making the request of a cabinet member via email, cc the superintendent. If a cabinet member receives a request for information via a telephone call, he/she will inform the superintendent.
- Participating in frontloading goal work.
- Providing feedback on benchmark reports.
- Sharing information whenever possible.
- Showing public support in meetings and out in the community.
- Trusting and supporting him.
- Sending him questions in advance when possible.

# **Escondido Union School District Governance Team**

## **AGREEMENTS TO FACILITATE GOVERNANCE LEADERSHIP**

### **Governance Team Norms and Protocols:**

The Board of Education for the Escondido Union School District is entrusted by the community to uphold the Constitutions of California and the United States, to protect the public's interest in the schools, and to ensure that a high-quality education is provided to each student. To effectively meet district challenges, the board and superintendent must function together as a governance leadership team. Agreed upon behaviors or norms, and operating procedures or protocols, support consistent behavior and actions among team members. The purpose of the Escondido Union School District governance team agreements is to ensure that a positive and productive working relationship exists among board members, the superintendent, district staff, students, and the community. Norms and protocols are developed for and by the members of the governance team and may be modified over time as needed.

*Our Agreements to Facilitate Governance Leadership:*

## **Norms**

**Our Governance Team Norm is to Follow the *Golden Rule*, “Do unto others as you would have others do unto you.”**

**We demonstrate this behavior, by:**

- Having and showing respect for others
- Being a unified team that focuses on the needs and successes of our students, not personal promotion, and agendas.
- Maintaining open, honest communication
- Listening to each other and other folks and finding common ground
- Providing the opportunity for our public to speak
- Having an expectation of full transparency
- Being concise and not monopolizing the conversation
- Bringing every conversation back to what is best for students
- Having an honest assessment of all data
- Maintaining confidentiality at all times, especially regarding closed session
- Maintaining our sense of humor

To this end, we have adopted the following meeting guidelines:

## **Meeting Guidelines**

- We will keep our focus on the best interest of our students and families.
- We will stay focused on our goals and avoid getting sidetracked.
- We will communicate openly and honestly with each other.
- We will all work to make sure there are no hidden agendas and that all issues and concerns can be dealt with openly by all members.
- We will build upon the ideas of others and look for common ground. We will paraphrase for understanding.
- We will wait to speak until a team member has finished talking. We will keep our remarks brief and to the point so that all opinions can be expressed.
- We will always be respectful to others and act in a civil manner.
- Each member will take responsibility for the work of the team; we will each be responsible for the success of the meeting, participate equally and address concerns.
- We will work toward the future – learning from the past.

# Protocols

## ESCONDIDO UNION SCHOOL DISTRICT Protocols: Board and Superintendent Operating Procedures

### **Purpose:**

The Board of Education is the educational policy-making body for the district. To meet the district's challenges effectively, the board and superintendent must function together as a leadership team. To ensure effective collaboration among team members, operating procedures or protocols must be in place. There are general protocols and those that are specific for the board and for the superintendent.

### **General -The Board and Superintendent will: \* CSBA**

#### **Governance Standards**

1. Keep learning and achievement for all students as the primary focus. \*
2. Value, support, and advocate for public education.\*
3. Operate openly with trust and integrity.\*
4. Govern in a dignified and professional manner, treating everyone with civility, dignity, and respect\*, while honoring the right to disagree with each other.
5. Define and respect the difference between administration and policymaking and respect the roles of each.
6. Keep confidential matters confidential.\* Uphold the legal requirement for confidentiality on all matters arising from board meeting executive sessions; will keep all conversations taking place in closed session absolutely confidential.

### **Board Members will:**

1. Work with all members of the board and the superintendent to become a team devoted to students; be dedicated to making all members of the team successful.
2. Act with dignity and understand the implication of demeanor and behavior.\*
3. Recognize and respect difference of perspective and style on the board and among staff, students, parents, and the community.\*
4. Focus on policymaking, planning, and evaluation for student success.
5. Govern within board-adopted policies and procedures.\*
6. Communicate a common vision.\*
7. Understand authority rests with the board as a whole and not with individuals.\* Recognize decisions are made only at properly scheduled meetings.
8. As an individual board member, not make or appear to make a decision that appropriately should be made by the entire board.
9. Support decisions of the majority after honoring the right of individual members to express opposing viewpoints and vote their convictions.
10. Abide by district superintendent-board protocols and agree to hold one another accountable when protocols are not followed.
11. Ensure opportunities for the diverse range of views in the community to inform board deliberations.\*
12. Attend regularly scheduled board meetings unless a situation occurs that makes attendance impossible; cooperate in scheduling special meetings and/or work sessions for planning and training purposes.
13. Understand the distinctions between board and staff roles, and refrain from performing management functions that are the responsibility of the superintendent and staff.\*
14. Acknowledge individual requests for additional information will be directed only to the superintendent.
15. Bring up at a board meeting any items they would like on a future agenda. One other board member should agree to the request in order for it to be agendized as a discussion item, with possible action to follow at a subsequent meeting.

16. Understand the superintendent's role to make personnel recommendations and changes in consultation with the board.
17. Understand the board as a collective body must give clear signals to its professional staff through its superintendent.
18. Participate in establishing annual expectations and goals for the superintendent.
19. Objectively evaluate the superintendent's performance and provide appropriate feedback.
20. Periodically evaluate its own effectiveness\* by reviewing its protocols at least every two years.
21. Take collective responsibility for the board's performance.\*
22. Communicate directly with the superintendent whenever a question or concern is raised by a staff member, student, parent, or community member.
23. Contact the superintendent whenever contacted by the media regarding an incident, event, or agenda item.
24. Communicate directly with the superintendent prior to board meetings to address questions and/or concerns about agenda items; honor the "no surprises" rule with the superintendent and fellow board members.
25. Communicate one-on-one with the superintendent when an individual concern arises; will not allow a matter to fester.
26. Cast a vote on all matters except when a conflict of interest arises.
27. Recognize the individual role of constituents and special-interest groups, while understanding the importance of using one's best judgment to represent all members of the community.
28. Represent the district, when possible, by attending community functions.
29. Participate in professional development and commit the time and energy necessary to be an informed and effective leader.\*

**TOPIC:**                    **PROTOCOL:**

**Site Visits and Rationale:**

**School  
Events**

As time permits, board members will visit school sites and attend school functions, to become familiar with the facilities, get to know the principals and observe what is happening on campuses, but will avoid disturbing instruction or interrupting employees at work.

**Therefore, we agree that:**

- Board members will arrange all site visits through the principals.
- They will copy the superintendent on final confirmations to keep him informed.
- When invited to visit by a teacher, board members will still confirm with the principal and copy the superintendent.
- Board members who have concerns about a class or program, will discuss their concerns with the superintendent and schedule a time to visit with the superintendent or a cabinet member.
- All board members are invited to debrief with the superintendent after their visits.
- Trustees should share all questions and concerns with the superintendent.
- Board members are invited to attend school events and performances as their schedules allow.

## FOCUS ON STUDENTS

### **The Superintendent will:**

1. Work toward creating a team with the board dedicated to students.
2. Respect and acknowledge the board's role in setting policy and overseeing the performance of the superintendent.
3. Work with the board to establish a clear vision for the school district.
4. Communicate the common vision.
5. Recognize that the board-superintendent governance relationship requires support by the district's management team.
6. Understand the distinction between board and staff roles and respect the role of the board as the representative of the community.
7. Accept leadership responsibility and be accountable for implementing the vision, goals, and policies of the district.
8. Prepare preliminary goals annually for the board's consideration.
9. Provide data to the board members so data-driven decisions can be made.
10. Make personnel recommendations and changes in consultation with the board.
11. Communicate with board members promptly and effectively.
12. Inform the board prior to critical information becoming public; apprise all board members in a timely manner of any major incident or when they may be called on to answer or explain.
13. Distribute information fully and equally to all board members.
14. Provide information requested by one board member to every board member.
15. Distribute the board agenda in a timely fashion and with enough time for board study and clarify information prior to scheduled meetings.
16. Never bring a matter to a public meeting that is a surprise to a board member or cabinet member.

17. Provide requests for additional information through a board update, special report, Board agenda items, or as a board workshop.
18. Present major decisions initially as a discussion item, then place it on the next board agenda for action.
19. Treat all board members professionally.
20. Conduct a self-assessment prior to the board's evaluation of the superintendent's job performance.
21. Complete the board's self-assessment instrument for the board's consideration once the board self-assessment process is determined.
22. Keep the board informed regarding issues and/or situations that could possibly concern parents, students, staff, or community.
23. Bring to the attention of the board matters that affect relationships.
24. Visit school campuses regularly.
25. Represent the school district by being visible in the community.
26. Model the value of lifelong learning.

Board Adopted March 21, 2013


We have reviewed and agree to follow the aforementioned governance team norms and protocols in order to support a positive and productive working relationship among the Escondido Union School District Board of Education, Superintendent, staff, students, and the community. We shall review and renew this document annually.


Affirmed on this 11 day of April 2024.


  
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Frank Huston, Board President

  
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Joan Gardner, Vice President

  
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Doug Paulson, Clerk

  
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Zesty Harper, Trustee

  
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