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# Oakland Unified School District Governance Team Retreat Version 2

June 23, 2023

Circa 9am

As presented by Dr. Carmella S. Franco, Consultant



# Governance Team Members

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Name	Role	District Director
Mike Hutchinson	President	District 4
Clifford Thompson	Vice President	District 7
Benjamin “Sam” Davis	Board Director	District 1
Jennifer Brouhard	Board Director	District 2
VanCedric Williams	Board Director	District 3
Vacancy	Board Director	District 5
Valarie Bachelor	Board Director	District 6
Dr. Kyla Johnson-Trammell	Superintendent	
Joshua Daniels	Chief Governance Officer	
Dr. Dexter Moore, Jr.	Acting Chief of Staff	

# Outcomes

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Review/Learn About	Identify	Recognize	Discuss	Commit
Review/Learn about the roles of the Board and the Superintendent.	Identify the factors involved in micromanagement and how to self-correct.	Recognize ineffective behaviors and self-correct.	Discuss common issues that arise during Board meetings and strategies or steps for addressing them within the Board Director role.	Commit to one or two strategies to working together as one unit for the greater good of the district and its students.

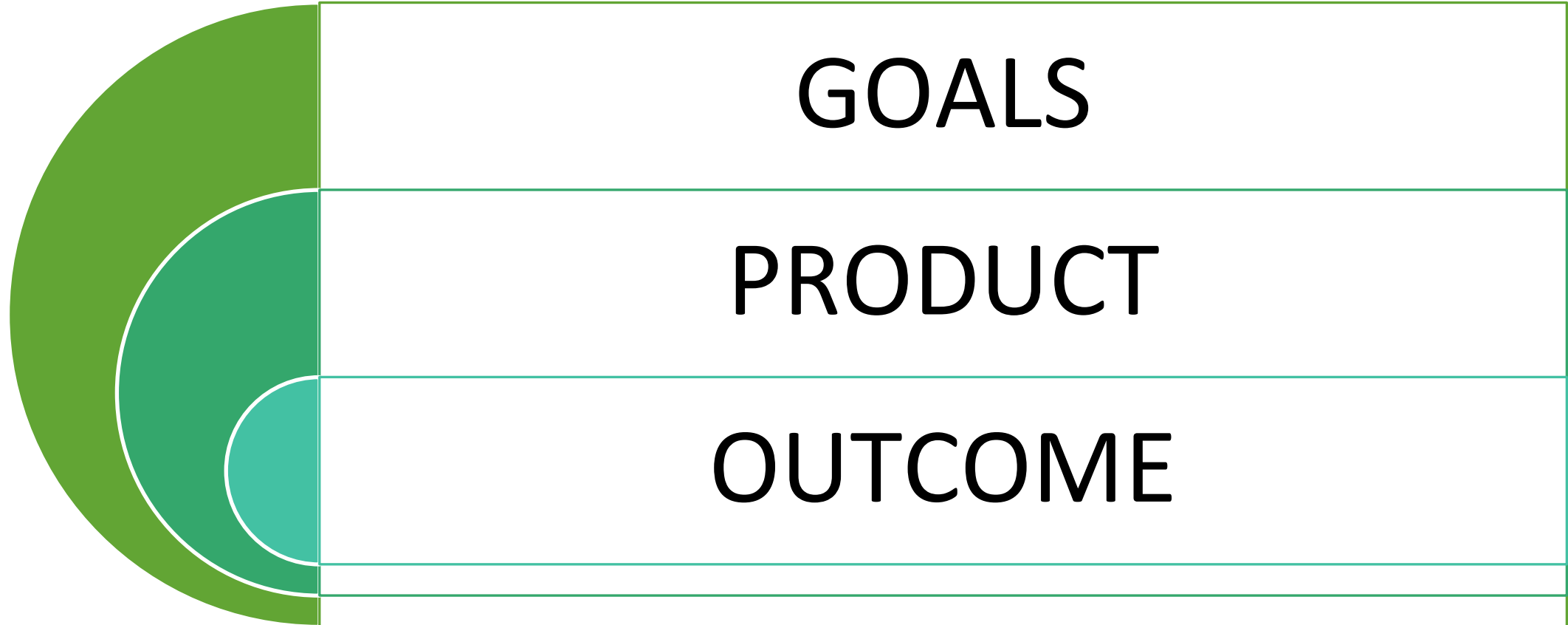


# Roles and Responsibilities

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# Board defines the “What?”

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# 5 Major Responsibilities of the “What”

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California School Boards Association. (n.d.). Role and Responsibilities. <https://www.csba.org/GovernanceAndPolicyResources/EffectiveGovernance/RoleandResponsibilitiesofSBMs.aspx>

# Major Responsibilities

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- Represent core functions that are fundamental to a school system's accountability to the public.
- Signify that authority is granted to the Board of Directors as a whole, not each member individually.
- These responsibilities are fulfilled by the Board of Directors, working together as a Governance Team with the Superintendent, to make decisions that will best serve all the students.

California School Boards Association. (n.d.). Role and Responsibilities. <https://www.csba.org/GovernanceAndPolicyResources/EffectiveGovernance/RoleandResponsibilitiesofSBMs.aspx>





# Roles and Responsibilities (not in priority order)

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- Responding to political reforms and mandates
- Accepting the slow pace of change
- Managing the volume of information
- Assuming responsibilities for all students
- Facing public education realities

# Roles and Responsibilities (not in priority order)



- Defining Vision, Mission, and Values
- Accessing good data
- Setting goals and priorities
- Meeting stakeholders needs
- Balancing individual demands against the greater good

# Roles and Responsibilities

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Meeting	Meeting stakeholders needs
Accepting	Accepting the slow pace of change
Managing	Managing the volume of information
Assuming	Assuming responsibilities for all students
Facing	Facing charter organization realities
Responding	Responding to political reforms and mandates
Defining	Defining Vision, Mission, and Values
Accessing	Accessing good data
Setting	Setting goals and priorities
Balancing	Balancing individual demands against the greater good

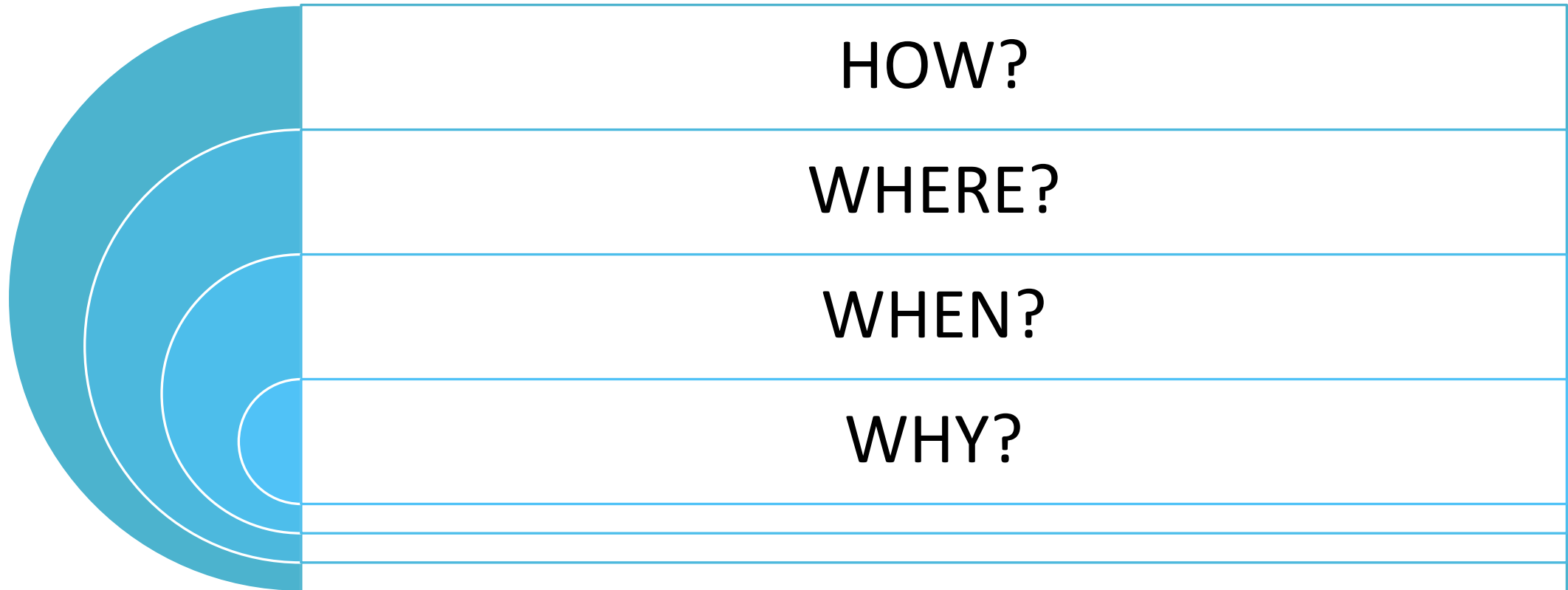
# Team Engagement

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Take a moment and review these roles and responsibilities. Rank your top 2 in order of importance to you.

# Superintendent is responsible for the:

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# Major Responsibilities of the “How, Where, When, and Why?”

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1

Leading and managing all operations of OUSD

2

Representing OUSD

3

Working collaboratively with the Board of Directors

4

Exhibiting Servant Leadership

# Three Essential Roles

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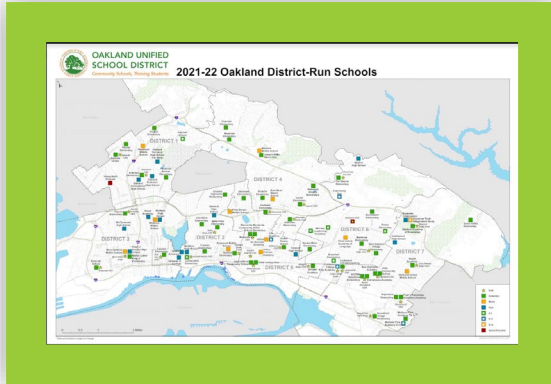
Strategic  
(Board of  
Directors)

Tactical  
(Superintendent)

Operational  
(Staff)

# Viewing the Roles

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Role of the  
Board of Directors  
(from 25,000 feet elevation)



Role of Superintendent  
(from 5,000 feet elevation)



Role of the  
Administrators, Teachers, and  
Staff  
("boots on the ground")



# Avoiding Micromanagement

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Micromanaging occurs when one role tries to assume the functions and responsibilities of another.



It typically occurs when a situation, instead of a role, is allowed to determine expertise.



The opposite of micromanagement is the alignment of the three essential roles and their coordination for common ends.

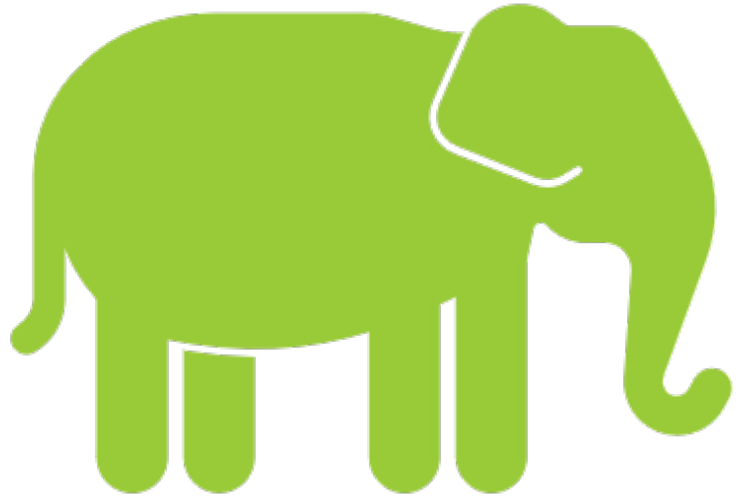
# Engagement Activity

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In pairs, identify the factors involved in micromanagement and ways to self-correct.

# Self Checklist

PROTOCOLS AND ROLES AND RESPONSIBILITIES			
	Yes	No	Comments
1. Adheres to respective roles and responsibilities			
2. Follows adopted Protocols (as appropriate)			
3. Arrives on time and is prepared to participate			
4. Calls in questions to the Superintendent with sufficient time for staff to respond			
5. Interacts in a respectful manner with staff, members of the community, and other stakeholders			
6. Other			



# Elephant in the Room

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For  
Discussion...

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# Important Questions

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As part of roles and responsibilities, it is important for the Governance Team to know how it is going to deal with a variety of situations. One question must be dealt with first.

**How are we going to become an effective, well-functioning team?**

# Team Engagement

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Discuss and describe your current governance situation. Why are certain situations occurring?

What behaviors are keeping you from becoming an effective team, that is, an effective Board that is making decisions based on the good of the entire district and its students?

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**What behaviors need to change?**

# Engagement Activity

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Write your thoughts about the question on post its. Place them on the chart paper provided.



In pairs, talk about the post it comments.



# Common Situations that Arise

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# Common Situations

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1. An agenda item immediately showcases the diverse views on the Board. How can you keep the conversation, during the round of comments, from turning argumentative and insulting? How can you comport yourself whereby you are respectful while sharing your different views?
2. During consideration of an agenda item under study, it becomes clear that more information is needed in order for a good decision to be made. What can your request look like?



# Common Situations

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3. Public and community input is one of many factors that come into play as you ponder difficult decisions. Ultimately, the accountability and responsibility for a decision rests with the Board of Directors. You are privy to a plethora of data and information to help guide you in making decisions. Review the chart on the left. How can you balance these factors so that you make the best decisions possible? What needs to be your major consideration at all times? How can you ensure that occurs?
4. As a Board Director, you must deal with special interest groups. This is a fact of Board life. How can you remain objective while still being a good listener? Discuss your understanding of “remain objective.”



# Common Situations

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5. Each of you has particular interests that led you to seek a seat on the Board. As you have seen, the multitude of issues impacting the entire school district requires that, to a large degree, you set your special interest(s) aside. Again, how do you balance everything? What can help you as you lead as only one of seven Board Directors (six at this time)?
  
6. The roles of the Board of Directors and Superintendent are clear, the *What* and the *How*. What question can you ask yourself as you encounter a situation and want to address it and solve it on your own? In other words, how can you stay in your own lane?



# Common Situations

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7. Exiting receivership is a major goal of the Board of Directors. Exhibiting fiscal responsibility and demonstrating effective, responsible governance are key to that occurring. The Board of Directors needs to set 5 or 6 overarching goals that will lead the way. How will you ensure that you are not distracted by issues better left to the Superintendent and staff to address?



# Commitment Engagement Activity

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Now, as a group, let's discuss what 1 or 2 things you can commit to doing in order to improve your effectiveness as a Board.

# Three things to keep in front of you

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IS IT IN THE BEST INTERESTS OF  
THE STUDENTS?



DOES THIS MATTER/ISSUE FIT  
WITHIN ONE OF OUR 5-6 GOALS?



IS THIS A TOPIC OR SITUATION  
FOR THE SUPERINTENDENT AND  
STAFF TO ADDRESS?

# Lastly...

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Did we maintain decorum and respectful behaviors as the Board of Directors during the meeting?

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Did we stay in our lanes and adhere to our roles as Board Directors and Superintendent?

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# Next Steps

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1. Continue to reflect on the discussion areas from today's retreat and how you can govern in a more effective way.
2. Revisit your protocols and areas of commitment.
3. At the end of each Board meeting, under Regular Board Member's Report, cite things that went well, and areas that need additional work and attention.
4. You may wish to use a self-evaluation checklist.
5. Consider scheduling a date for your next retreat.



# Questions

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Thank you

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