CALIFORNIA**COLLABORATIVE**
on District Reform

Keeping the Main Thing the Main Thing

Lessons About Effective School Board Governance From Napa Valley and San José Unified School Districts

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Executive Summary

The many pressures facing school districts can easily overwhelm educators and distract from the core work of instruction and student learning. Locally elected school boards, the governing bodies responsible for setting district policy, can play an instrumental role in establishing and maintaining focus in a district's work. In today's increasingly polarized political environment, however, media attention to school boards tends to highlight dysfunction and disruption. As a counterpoint to those stories, two California districts offer examples of collaborative and productive approaches to governance that establish and maintain focus on their highest priorities. By exploring the cases of Napa Valley and San José Unified School Districts (NVUSD and SJUSD), we can better understand what the work of school boards entails. Through their example, we can observe ways in which governing teams of board members and superintendents ensure persistent attention to the issues that will enable students to experience success.

Understanding the Role of School Boards

School board candidates appear on the ballot of nearly every California voter, yet members of the general public—and even board candidates themselves—frequently misunderstand the roles and responsibilities of boards and the members who make them up. School boards, elected to staggered, 4-year terms by voters within the boundaries of a district, govern most of the state's school districts. California Education Code identifies certain school board responsibilities, which include developing, passing, and adjudicating district policies; approving the district's budget; and hiring and evaluating the district's superintendent.

Important dynamics also shape the ways in which board members work together. Candidates for school board need not bring any prior knowledge or experience to their roles. Like many other elected officials, board members' power exists only as part of a collective, because decisions require a majority vote to pass. And the purview of a school board is indirect. Boards' official responsibilities deal with strategy and policy, not operations, and they oversee only a single employee: the superintendent. Successful boards must navigate these dynamics through deliberate actions that establish role clarity and enable healthy patterns of interaction and decision making.

Preparing Trustees to Succeed Through a Strategic Approach to Onboarding

Confusion and distraction often result when trustees misunderstand their roles. Individual board members might pursue an issue of personal importance or interest to a subset of community members, but they may do so in a way that exceeds their authority as a trustee, sends mixed messages to educators in the system, or even undermines other improvement efforts already underway. In SJUSD and NVUSD, effective governance begins by educating and preparing new board members to succeed in their positions. Both districts have developed an approach to onboarding that extends beyond what most newly elected board members receive to prioritize both relationship building and knowledge development. Through this process, members of the governing team establish a clear understanding of their roles and responsibilities. Moreover, by equipping board members with the knowledge and skills they need, the districts enable board

members to govern more effectively in collaboration with their fellow trustees and on behalf of the students they serve.

Ensuring Focus Through a Commitment to District Priorities

Federal and state mandates, funding streams with programmatic and reporting requirements, resource constraints, and demands from vocal and well-organized members of the school community introduce pressures for school districts. Desires to ensure compliance or respond to requests raised during public board meetings can overwhelm district leaders. Too often, the result is system fragmentation: targeted activities planned and executed in isolation from one another, and an overloaded system in which educators struggle to accomplish any of their stated goals effectively. The governance teams in NVUSD and SJUSD have established a clear direction for their districts through the development of and commitment to a strategic plan. The teams in both districts actively use these plans to establish priorities and make decisions about actions to pursue and, just as importantly, requests they must decline in order to maintain focus. Through their commitment to a clear and limited set of priorities, the districts orient their attention toward doing the things that matter most and doing them well.

Facilitating Effective Governance Through Commitment to Shared Norms

Productive governance in SJUSD and NVUSD involves not only a collective understanding of the district's vision and direction, but also a set of jointly held expectations for how the members of a governing team should interact with one another. By establishing and holding one another accountable for these shared norms, the superintendents and board members in both districts foster consistency in the ways they work together. Examples include a commitment to ensuring that board members are knowledgeable and well informed, that members of the governing team treat one another with respect, that the board operates as a collective body and not merely as a collection of individuals, and that board members embrace the responsibilities associated with their position. Through these standards of behavior, the governing teams in both districts reinforce their attention to overall goals and priorities and avoid many of the interpersonal struggles that can derail district improvement efforts.

Managing Effective Governance From the Superintendents' Chair

Although board policy helps set the direction for a district, the effectiveness of any decision fundamentally relies on the teachers, administrators, and support staff in the central office and at school sites. Efforts to foster system coherence require mutually supportive activities across strategies, departments, and people. The superintendent plays a vital role in ensuring alignment across the system by bridging policy leadership from the board with operational leadership from the central office. In addition to their leadership of the onboarding process, the NVUSD and SJUSD superintendents foster these strong connections by prioritizing board management and dedicating their time and attention to governance. Proactive and effective communication, part of a broader effort to cultivate relationships with board members, is a crucial aspect of the superintendent role.

Navigating Controversy in the Community

In any large community, differences of opinion are inevitable. Disagreements can become especially intense in a school system, which many families see both as an anchor of their community and a reflection of their own values. These controversial issues can dominate public comment during board meetings and derail efforts to advance key district priorities. In SJUSD and NVUSD, board members have had the courage to make difficult decisions, confident that they are acting in the best interests of the district even when their votes are unpopular. Members of the governing teams have also demonstrated a commitment to engage with community members about their choices—both to solicit input as part of an informed decision-making process and to explain matters before and after the fact. Examples of two highly charged issues—school closures in NVUSD and police presence in SJUSD schools—illustrate ways in which the teams have navigated controversy and maintained focus in the process.

Weathering Threats to Productive Governance

School districts operate in a context that increasingly reflects our polarized political landscape, and school boards in some communities have become platforms for disruption and ideological grandstanding. Members of the governance teams in both districts expressed confidence in the strength of their culture and commitments to one another to withstand some degree of disruption. Nevertheless, any team is vulnerable to a movement strong enough to shift a board majority away from a collaborative orientation. It may therefore be important for school boards to demonstrate the value that comes from working together, disagreeing respectfully, and persistently acting in the best interests of students.

Prioritizing Governance to Ensure System Effectiveness

The approach to improvement in any district must respond to the history, strengths, and challenges in its community. In any context, however, the lessons gleaned from the SJUSD and NVUSD governing experiences can enhance a school board's effectiveness. Taken together, the examples of NVUSD and SJUSD underscore the lesson that governance is a continuing priority that requires constant attention and care. Governance is not merely an initial step before the "real work" can happen; governance itself is part of the real work that will enable other aspects of the system to thrive.

Introduction

School districts face profound challenges as they strive to prepare students for postsecondary success. In the wake of the COVID-19 pandemic, student achievement has stagnated and learning progress lags behind pre-pandemic trends. Outcomes are especially troubling for students of color, students from low-income families, and English learners—all of whose performance reflected a disparity in opportunity even before COVID-19 hit.[1] Widespread educator shortages complicate efforts to support the full range of student needs,[2] and for teachers, administrators, and support staff who remain in their positions, the unrelenting demands of their jobs have led many to question the sustainability of their roles.[3] Relief funds from state and federal governments, combined with funding streams for new programs, infused much-needed resources into school systems. However, even these well-intended efforts can overwhelm school systems, threaten to fragment improvement approaches, and leave districts in dire financial straits when one-time funding runs out.

Collectively, these challenges threaten to undermine the effectiveness of school districts. Coherence—the alignment, interconnectedness, and consistency of roles and strategies—is a critical feature of improvement efforts that manifests in the behaviors and mindsets of educators and promotes sustainable change.[4] However, increasing and often competing priorities make it difficult for districts to maintain focus. Attending to a growing set of issues frequently pushes districts to specialize and fragment the organization and execution of improvement strategies. The impulse to address every issue that comes before district leaders too often leads to incompletely developed and poorly implemented approaches that serve no one well. In an environment where coherence may be most important, the multiple forces at play in school districts pushes them in other directions.

In the face of mounting challenges, school boards can play a vital role in establishing and maintaining a direction for the district. As elected bodies responsible for policymaking at a local level, boards of education set priorities, approve budgets, and determine where districts should invest their energy and resources—and, just as critically, where they should not. However, the polarized nature of our national political environment has increasingly made its way into the work of school governance. Political parties have targeted board elections as vehicles for gaining influence, raising the risk of a shift toward politics that eclipse matters of student learning.[5] Board meetings themselves too often become platforms for political posturing and confrontation rather than problem-solving. School board recall votes in multiple districts reveal an electorate that is frustrated with an approach to governance that can distract from and even undermine the key issues of teaching and student learning.[6]

Fortunately, there are models of effective governance from which we can learn. Two California districts, Napa Valley Unified School District (NVUSD) and San José Unified School District (SJUSD), have earned the respect of their peers for the ways in which the teams of superintendent and board members work together to advance the best interests of students in their care. Indeed, one of the many factors that characterizes the health of these districts is their view of the superintendent and trustees as members of a governance *team*. Governance in NVUSD and SJUSD has enabled

the districts not only to establish a clear direction, but to create an environment that prevents the pressures endemic to public education from derailing their efforts.

This report serves two purposes. First, recognizing that even members of the K–12 education community frequently misunderstand the role of school boards, it pulls back the curtain on governance work by highlighting the strategies and commitments that characterize the approaches in SJUSD and NVUSD. Second, the report identifies lessons learned that can inform other district leaders and board members seeking to improve how they serve their students and communities.[7] Although any governance team must tailor its approach to the history, existing programs, politics, and needs of its own community, the NVUSD and SJUSD experiences offer lessons for any district to reflect on and improve their effectiveness. At a time when challenges can feel insurmountable, these examples offer hope and ideas for a path forward.

NOTES

1. See, for example, Lewis and Kuhfeld (2023), Bahena and Morales (2023), and Dorn et al. (2022).

2. See, for example, Carver-Thomas et al. (2022), Diliberti and Schwartz (2022), and Schmitt and DeCourcy (2022).

3. See, for example, Steiner et al. (2022) and GBAO Strategies (2022).

4. Authors like Forman, Stosich, and Bocala (2021) and Fullan and Quinn (2015) offer robust descriptions of what coherence entails in the context of K–12 education. Examples of empirical studies that connect stronger coherence to better student outcomes include Newmann et al. (2001) and Moon et al. (2021).

5. See Kamal (2022).

6. Recall efforts have taken place in both traditionally liberal and conservative communities. In February 2022, voters in San Francisco Unified School District recalled three board members, in part due to frustration that the school board spent time debating a plan to rename 44 public schools during the height of the COVID-19 pandemic when the district had not yet established a plan for reopening schools (Granitz, 2022). Meanwhile, a recall effort for two trustees in Orange Unified School District appears to have gathered enough signatures to qualify for the ballot after the newly elected board fired the district's popular superintendent without cause while the superintendent was abroad, then adopted a controversial gender notification policy (Fensterwald, 2023).

7. This report draws on interviews with the superintendents and all board members in SJUSD and NVUSD, conducted in summer 2023, and a panel discussion involving four members of the governance teams during a February 2023 meeting of the California Collaborative on District Reform. The authors also reviewed district documents, including agendas and minutes from board meetings, and observed board meetings themselves in person and through streamed broadcasts of the proceedings.

Napa Valley and San José Unified School Districts

To illustrate what the work of school boards entails and the practices that can create the conditions for a thriving district, this report explores the cases of the San José and Napa Valley Unified School Districts. Both districts have developed a strong reputation among their peer superintendents as having highly functional superintendent–school board relations. The two districts have superintendents with relatively long tenures (7 years in SJUSD and 5 years in NVUSD), both of whom are invested in using and sharing best practices for working with their boards. After a panel discussion among superintendents and board members during a February 2023 convening of the California Collaborative on District Reform highlighted details of the districts' approaches to governance, meeting attendees noted the potential benefit of sharing lessons from their work with a broader audience.[1] This report is a response to that identified opportunity.

SJUSD is one of 19 school districts in the city of San José, California. The district serves approximately 26,000 students, who are predominantly Hispanic/Latino, White, or Asian. NVUSD serves approximately 16,000 students living in the cities of Napa, American Canyon, and Yountville, California. Most students identify as Hispanic or Latino, with a quarter identifying as White. Sixty-two percent of NVUSD students and 43% of SJUSD students qualify for free or reduced-price lunch. See Exhibit 1 for additional demographic details.

Exhibit 1: Demographic Profiles of San José and Napa Valley Unified School Districts, and California, 2022–23

	San José USD	Napa Valley USD	California
Total enrollment	26,479	16,441	5,852,544
African American	2.3%	2.3%	4.7%
American Indian or Alaska Native	0.1%	0.2%	0.4%
Asian	13.3%	2.6%	9.5%
Filipino	1.9%	6.5%	2.2%
Hispanic or Latino	54.8%	58.1%	56.1%
Pacific Islander	0.2%	0.2%	0.4%
White	20.7%	25.1%	20.1%
Two or more races	6.6%	4.8%	4.3%
Not reported	0.0%	0.2%	2.2%
English learners	23.3%	24.0%	19.0%
Free or reduced-price meals	42.6%	62.2%	59.9%
Special education*	11.4%	11.8%	12.9%
Current expense of education per ADA**	$16,996	$13,995	$17,021

*Special education data are from 2018–19 school year.

**Current expense of education per ADA is from 2021–22 school year.

Source: California Department of Education, DataQuest [online database], district enrollment by race, English learner, free and reduced-price meals, 2022–23, dq.cde.ca.gov; California Department of Education, DataQuest [online database], district enrollment by special education district of service, 2018–19, dq.cde.ca.gov; Ed-Data [online database], current expense of education per ADA (per Education Code Section 41372), 2021–22, ed-data.org.

With respect to governance, the school board in SJUSD includes five trustees, each representing a different geographic area within the district's boundaries. NVUSD's school board has seven members who each represent a geographic area of the district. Board members in both districts serve 4-year terms, though some of the current members were appointed in their first term when a previous trustee was unable to complete their term and needed to be replaced. In both districts, some board members have served multiple terms, while others are new to the role. As of summer 2023, SJUSD's school board members had been in their positions anywhere from 5 to 11 years, and NVUSD members had served between less than a year and 7 years on the board.

NOTES

1. For additional resources from this meeting, including briefing materials prepared for participants and a written summary of insights that emerged from the group's dialogue, please see https://cacollaborative.org/meetings/meeting49.

School Boards in California

School boards play an important role in shaping K–12 education at the local level. Although the research base is limited, several analyses highlight features of highly effective boards[1] and even find associations between board effectiveness and student achievement.[2] Yet despite regular board member elections and eye-catching headlines that report newsworthy board votes, members of the general public—and even school board candidates and members themselves—often misunderstand what the role entails. If districts are to establish and maintain coherence, all aspects of the school system must work towards the same clearly outlined goals—which requires leaders at all levels to understand the ways in which they contribute to a larger whole. When individuals cross the boundaries of their own responsibilities, the redundancies or mixed messages that result divert the district's energy and attention away from a path toward improvement. Although the dynamics of each school board vary depending on the local context, California has developed regulations and guidelines that define how school boards operate in California. In recognition of the importance of role clarity, we begin by outlining what a school board is, what it does and does not do, and why it is a unique fixture of how schools and school districts are organized.

How School Boards Are Structured in California

School districts in California are locally governed by community representatives known collectively as a school board. Voters who live within the boundaries of a traditional public school district elect members of the board (also known as trustees[3]) into their positions.[4] Trustees serve 4-year terms that are often staggered to ensure that only a subset of the board is up for election in a given year. Guidelines for these nonpartisan elections typically require candidates to live within the boundaries of the school district they wish to represent. In cases where a board member is unable to complete their term, the board can choose to either appoint a replacement or hold an election to select one. Boards comprise three, five, or seven members; most California school boards have five members.[5] Many trustees in California, including those in NVUSD and SJUSD, receive a modest stipend for their role.[6] In the two districts featured in this report, members annually select a president and vice president to take responsibility for running public meetings.

Statutory Parameters That Shape School Board Activity

California Education Code identifies certain school board responsibilities,[7] which generally fall into four categories:

1. Develop and pass policies for the district that are aligned with California Education Code,
2. Adjudicate when district policy has been violated,
3. Approve the school district's budget, and
4. Hire, evaluate, and (if necessary) fire the school district's superintendent.[8]

Additionally, California has specific requirements about how trustees engage with each other in and outside of board meetings and how board meetings are organized. The Ralph M. Brown Act delineates what a public meeting entails (such as public notice of scheduled meetings), and under what conditions trustees are allowed and not allowed to discuss

official school district business. The Brown Act also specifies that a board may conduct closed sessions (i.e., a meeting or portion of a meeting that is not open to the public to discuss sensitive information) and identifies the conditions under which a closed session is legally allowed.[9] For more information, see the text box on The Brown Act below.

The Peculiarities of an Elected Board of Education

The unique role that school boards play in shaping district decisions is clearer when taken in the context of other elected positions, other roles in a school district, and even other governing boards.

Boards Do Not Require Any Prior Experience

Like many publicly elected positions, no prior knowledge or experience is required to run or be elected to a school board. New trustees may begin their roles without any previous interactions with or on boards, a background in education, or knowledge about existing state or district policies and strategies. The effectiveness of a school board therefore depends in part on the ability of a school system to develop the knowledge and skills among its trustees to make consequential decisions on behalf of the district community.

The Board's Power Exists Only as a Collective

Similar to Congress, school board members' power to create policy exists only as part of a collective. Any decision requires a majority vote to pass, and a quorum is required before trustees can address any district business. Because of these dynamics, any individual trustee is powerless to make district official policy without the support of a portion of their colleagues. Luan Rivera trains and supports many school boards, including NVUSD, as an educator and consultant for the California School Boards Association (CSBA, see text box on page 10). She described a common challenge that newly elected board members experience: "They just can't go into the superintendent's office and tell him or her what to do. Direction to the superintendent comes from the board as a whole. … People will

The Brown Act

Originally passed in 1953, the Ralph M. Brown Act protects the public's right to attend meetings of local legislative bodies. School boards are required to make their meetings public,[10] and the Brown Act delineates what makes a meeting public:

- Meetings must be open and accessible to the public, and public notice must be given for all meetings.
- The agendas for regular meetings must be publicly available at least 72 hours prior to each meeting, and 24 hours prior for special meetings.
- Meeting minutes must be taken and made publicly available.
- All votes that board members make must be cast publicly and not anonymously.
- Meetings must have a quorum (a minimum number of members needed to conduct official business, typically set as a majority of board members present).
- Members must not engage in a series of meetings with less than a quorum to work on official business. This is to prevent a work-around to the public meeting requirements.
- Even if a quorum exists in another setting (e.g., a social event, conference, or meeting of another legislative body), members are not allowed to discuss the business of their board amongst themselves in that setting.

often say to me, 'Well, I've been on all these other boards,' but … there's nothing quite like being on a school board." SJUSD Superintendent Nancy Albarrán shared a similar view and suggested that the public's view of how a board functions could contribute to this misunderstanding. She noted, "The public's perception is that an individual person, an individual board member, has the ability, the authority to drive an agenda at the district level. [It] isn't clear to the public that a trustee needs two other votes [on a five-person board] to be able to do anything."

> "There's nothing quite like being on a school board."

The process of creating a cohesive and informed governing team requires its members to navigate the varying levels of experience and range of opinions about how to run school systems. Rivera described the experience of being on a board as "being thrown together with a group of people … that you might not have ever met before, who might be very ideologically different than you. And suddenly you're thrust together, and you have to work together as a team. We're human beings. That is not always an easy task." Knowing that board members *have* to work together to make any decisions, it is critical that they work together productively across differing viewpoints and expertise.

Boards Oversee Only One District Employee—the Superintendent

School boards are also noteworthy because they only hire and supervise a single employee. The dynamics for board members and superintendents are therefore distinct from the reporting relationship of any other leader in the district. Before becoming superintendent, NVUSD's Rosanna Mucetti explained, "I had one boss for 5 years. Then you shift to this role and you're like, 'I have five to seven [bosses]. I have to treat them as individuals, but they only operate as a collective. Then every 2 years, the composition of those five to seven people can change.' No one ever said it to me like that. No one just put it that simply."

Boards Work at the Policy Level

Like other elected officials, school boards are responsible for developing and adopting district policies, not for implementing those policies. For example, boards might create the guidelines for hiring and evaluating educators, but it is administrators in schools and the central office who actually hire and evaluate teachers and other employees. Similarly, boards approve the adoption

California School Boards Association (CSBA)

- CSBA is a nonprofit organization that provides training to school board members, produces publications related to school governance, and represents and advocates for the interests of school board members across the state. Among its many roles, CSBA offers direct support to governance teams through an annual conference that provides an orientation to new trustees through a range of learning and networking opportunities.
- CSBA also provides additional services through trainings to trustees and fee-based consultations with individual districts. For example, the Masters in Governance for Districts program offers five courses that cover essential principles in governance coursework and help board members better understand and navigate their roles and responsibilities. The Good Beginnings workshop is another example of a process through which CSBA personnel guide governing teams to organize their work together.

of curricula and programs but do not oversee their use in classrooms. Trustee Brian Wheatley reiterated this distinction between setting and implementing policy: "One of the hardest things, at least from my view as a trustee, is to not get over on the operational side. And I always say, we're at the 30,000-foot level. We look at policy. We look at budget." As a former teacher herself, NVUSD trustee Eve Ryser recalled struggling with this part of her role, noting that "teachers who become trustees almost have a harder time because the lens that you need to use to look at issues is so very different. And as a longtime educator, it took a lot of consciousness to stay with my trustee lens and to not dive into the weeds with my teacher lens. … It was a real shift."

Operating with consistency and focus at the district level requires alignment throughout the school system. The following sections of this report illustrate ways in which SJUSD and NVUSD create a clear understanding of the school board's role in the improvement process and navigate the responsibilities and relationships it involves.

NOTES

1. See Devarics and O'Brien (2019), Maricle (2014), and Delagardelle (2008).

2. See Ford (2013).

3. School board member and trustee are synonymous in California, but other states call their school board members different terms. For example, the governing bodies in Massachusetts are "school committee members." In Pennsylvania, they are "school directors." In this report, we use the terms school board member and trustee interchangeably.

4. The voting process to select school board members occurs in one of three ways: (1) "at large," where the voters in a district's boundaries vote on all candidates, (2) "by trustee area," where candidates must live in and represent a specific area of the school district's boundaries and are elected by voters who live in that same area, or (3) "from trustee area," where candidates must live in and represent a specific area of the school district's boundaries but are elected by all voters within the district's boundaries.

5. California School Boards Association (2018).

6. The compensation provided to trustees in the Los Angeles Unified School District is a notable exception. See https://edsource.org/2022/senate-bill-would-modify-state-law-to-allow-higher-school-board-salaries-but-only-for-lausd.

7. The powers and duties of school boards are available at https://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?lawCode=EDC&division=3.&title=2.&part=21.&chapter=2.&article=4.

8. For example, see Bauld (2023), Illinois Association of School Boards (n.d.), California School Boards Association (2013), and California School Boards Association (2018).

9. California Attorney General's Office (2003).

10. See https://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?lawCode=EDC&division=3.&title=2.&part=21.&chapter=2.&article=3.

Preparing Trustees to Succeed Through a Strategic Approach to Onboarding

Given the unique and generally misunderstood role of the school board, newly elected trustees can potentially walk into their new positions with a poor sense of what they will be expected to do and how it contributes to the larger mission of the district. Through a successful onboarding experience that helps trustees establish a clear view of their responsibilities, school boards can better shape and maintain a consistent direction for district improvement efforts. Beyond the basic trainings offered statewide, NVUSD and SJUSD conduct onboarding procedures "in house" as a proactive way to ensure that trustees have clear expectations for what their work entails and how they will engage in that work.

> Running an election is easy. … It's the legislating part that's really hard.

The Learning Curve of New Governance Team Members

The onboarding process can help dispel any misunderstandings about the role of a governance team. Interview respondents described some of the common lessons that emerge in the initial weeks of a new trustee's tenure on the board.

Shift From Campaigning to Governing

Because first-time board members are often surprised to learn about the limits of their individual authority, some onboarding activities include educating trustees about how to work together. Some interview respondents described ways in which the process of a campaign for office and the kinds of messages it entails can underemphasize the importance of teamwork. Candidates often make promises on the campaign trail about what they will do in office even though any policy decision requires the votes of the board's majority. SJUSD trustee José Magaña noted the difference between campaigning for and actually serving as a board member by saying, "Running an election is easy. … It's the legislating part that's really hard. You can say a lot of things out there on social media, but rubber hitting the road is actually the hardest part of it all. Because great, you have these ideas, but again, you need three people to agree to what your ideas are, and you need staff to implement it." CORE Districts Executive Director and California Collaborative member Rick Miller, a former board member himself, made a similar comparison when relaying his own experience: "You feel like you always have to say yes as a candidate and then [once you join the board] you always have to say no practically overnight."

Trustees Represent the Entire District

Even in districts where voters select a trustee to represent their own geographic region, board members are responsible for creating policy on behalf of the entire school district—not just a single trustee area, issue, or population of students. SJUSD board member Teresa Castellanos noted that she is proud to serve the specific geographic area of SJUSD that she represents, but her "responsibility is the whole school district. Sometimes the community understands that and a lot of times they don't." Similarly, trustee Julianna Hart described her commitment to all, not some,

students in NVUSD when she compared the trustee position to other elected positions: "School boards are not the glamorous, shiny politician, city councils and county supervisors and things that are in the news every other day. … We have a budget that's double [that of] the city of Napa that we manage, and we have 16,000 children that we're responsible for educating. So that's a pretty big deal." NVUSD Superintendent Mucetti noted the misunderstanding that often emerges when she meets individuals running for board positions. In her experience, candidates who are motivated by a single issue sometimes lack awareness of the full range of issues for which trustees are responsible.

Interview respondents also described ways in which the information they had access to as a trustee changed their perspective on how and why decisions are made. For example, Hart described the transition from being a parent in the district to becoming a board member, calling it "very eye opening to see how complicated it is to run a school district." She went on to say, "When you have a very limited point of view from a parent, you're not really seeing the full picture, like all the administration that's required, all of the background for the teachers, all the professional development that gets done, all of the legal things that need to be handled."

Superintendents Are Unfamiliar With Governance Prior to Being Superintendent

Board members are not alone in facing a steep learning curve. Superintendents typically receive little to no formal training about how to engage with their school board. SJUSD Superintendent Albarrán remembers having limited exposure to the board, even in her other senior positions in the district, before becoming superintendent. Although she received advice from other superintendents about how to work with her board, she "had not had any training, formal training in … superintendent governance, the relationship between the superintendent and the board. I … only understood the relationship from afar." Superintendent Mucetti shared a similar sentiment: "You don't understand how impactful the governance element of the job is until you get into the [superintendent's] seat. Something that I'm deeply committed to professionally, is creating more of a window into that. I think we need to talk more candidly and openly to emerging leaders, future aspiring superintendents, people who might not see themselves there yet, but we see it in them." Providing others with a clearer view of what governance and board management entails can be critical in allowing a district to effectively make decisions and craft policy.

NVUSD and SJUSD Approaches to Onboarding

The formal training that most trustees receive about their responsibilities is limited. Most school districts use the CSBA annual conference as an opportunity to train newly elected trustees. The trainings offered by CSBA give a basic introduction to the legal parameters within which boards must operate. In NVUSD and SJUSD, locally designed approaches to onboarding new trustees expose them to the dynamics of the district and orient them to their role.

Superintendent Is Involved Early and Often

The superintendent in both districts plays a critical role, interacting with each new trustee early and regularly. These opportunities include one-on-one opportunities to answer questions and build a relationship as well as to facilitate trainings from and introductions to central office leaders. NVUSD board member Robin Jankiewicz reported that

Superintendent Mucetti "sits through every legal meeting with [each new trustee], then she sits through the finance 3-hour meeting with that person, then she does the onboarding, then she sits with a communications director, and she goes through the onboarding. She sits in on every single one of those meetings." SJUSD takes a similar approach, often including the current board president in new trustee trainings. Trustee Wendi Mahaney-Gurahoo recalled her onboarding process, in which Superintendent Albarrán "set up specific areas and she'd bring the content experts to take me through each of the areas that we're responsible for, that they are responsible for, including our president. So [the president] was in all of [the meetings], and so he would interject where the relationship between administration and the board happens and also doesn't."

Teams Develop Relationships

Both districts deliberately create team-building opportunities through workshops or special sessions. Trustee Elba Gonzalez-Mares articulated a belief that is central to NVUSD's onboarding approach: "When there's new board members coming in, you're a whole new governance team." Luan Rivera echoed the point by explaining that in her work with NVUSD and other districts across the state, "every time one member of a team changes, the entire chemistry and dynamics of a team changes, so that we need to build that new team and also to help, again, orient the new members and help them understand their role." One way NVUSD works towards a new sense of team belonging is by continually revising its school board governance handbook. This process often begins with a workshop facilitated by a partner from CSBA called Good Beginnings.[1] The first part of the workshop focuses on forming a new team and giving trustees the opportunity to form relationships with and develop respect for one another. The second part asks trustees to co-develop norms and protocols for how they will work together. NVUSD uses what comes out of these conversations to agree on group norms, which they then document in a handbook. Board members use the handbook regularly in the board's work together to highlight norms and remind one another of their commitments to the group.

> When there's new board members coming in, you're a whole new governance team.

Ongoing Learning Opportunities Keep Trustees Informed

The onboarding activities at the beginning of each trustee's term provide a strong foundation from which they can navigate the responsibilities associated with their roles. Opportunities throughout the year support ongoing capacity building. Multiple trustees described their decision to pursue the Masters in Governance program offered by CSBA as a vehicle for strengthening their contributions to their respective boards. Within the districts, study sessions and committees organized around key decisions coming before the board ensure that board members learn with and from each other in ways that prepare them to pose the right questions and vote responsibly in the best interest of the district's students.

What a Strong Onboarding Experience Allows Trustees to Do

After undergoing the onboarding process as a new team, interview respondents shared that they often developed a stronger level of trust with one another. As a longtime board member, Cindy Watter from

NVUSD reported feeling unsure about some of her colleagues when they first joined the board. She recalled that twice during her tenure, the onboarding experiences with newly elected board members had helped to shift her feelings about the new colleague: "I realized that [the new trustee] was going to be a great addition to the team." When first elected in NVUSD, Eve Ryser shared that fellow board members made her initial experiences on the team welcoming by doing "little things like a [long-standing] trustee reaching out before the first meeting and saying, 'Do you have any questions?' or 'If you raise anything from the consent agenda, remember that you have to speak out at the beginning,' just little things like that that were helpful." In SJUSD, trustee Carla Collins described her initial interactions with Superintendent Albarrán as critical to developing confidence soon after their election: "It's the superintendent who, she gave me a ton of information right at the beginning of just getting up to speed and where to find information … I feel very well supported in that respect."

Trustees further reported that the clear understanding of their roles and responsibilities equips them to hold one another accountable for the tasks entrusted to them. For example, NVUSD board member Elba Gonzalez-Mares described a time when she could tell a colleague on the board had not completed the entire onboarding process based on a comment the new trustee made. Gonzales-Mares recalled holding her fellow board member accountable by saying, "Everybody's coming here ready to do what needs to get done, and I know as a new trustee, you're needing to spend a little more time on the onboarding, but it's super critical, because business needs to get done today. There's a school district to be run. We can't pause here and spend 30 minutes explaining to you why your comment is not right." Onboarding sets common expectations for working together that enable their work to happen effectively and efficiently.

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1. SJUSD's governing team also works with CSBA to participate in the Good Beginnings workshop.

Ensuring Focus Through a Commitment to District Priorities

Forces inside and outside the system complicate districts' efforts to work coherently toward set goals: State and federal funding streams create expectations for programming and reporting. Public comments at board meetings highlight concerns from the best organized and most vocal members of the community. And the range of students' academic, social, and emotional needs—especially in the wake of the COVID-19 pandemic—calls for multiple interventions and supports. Unsurprisingly, these demands for action often conflict with one another. The resulting dynamics can overwhelm district leaders, fragment districts' approaches to meeting student needs, and undermine districts' ability to accomplish their stated goals.

> The strategic plan is our guiding light. If we stray from that, conversations get more difficult and those who lose out the most are our students.

Research on school boards consistently underscores the importance of establishing a clear vision and goals for a district's work.[1] Consistent with these findings, the commitment to key district priorities in SJUSD and NVUSD helps create focus for the work of the governance team.

A Clear District Vision Establishes a Pathway for Success

In both districts, prioritization begins with a strategic plan that breathes life into the district. Although many districts develop strategic plans to articulate a general direction and set of strategies, the plans often collect dust on shelves or live in an obscure corner of the district's website. In NVUSD and SJUSD, these are living documents that directly shape decisions for their governance teams. At the heart of these plans is a commitment to do what is best for the students in the district. Moreover, the processes through which the districts create these plans are opportunities for outreach to all members of the district community to ensure that the resulting strategy reflects that community's most pressing needs. SJUSD board member José Magaña connected faithfulness to the strategic plan with the district's ability to maintain attention to students' needs: "The strategic plan is our guiding light. If we stray from that, conversations get more difficult and those who lose out the most are our students."

In SJUSD, the district's priorities connect directly not only to the strategic plan but also to a board policy on equity. With respect to the general areas of focus for the district, Superintendent Nancy Albarrán noted, "The board identifies our priorities, and goals are set. At board meetings, every presentation is about those focus points." An additional equity lens shapes the issues the board takes on and the decisions it makes. SJUSD has a longstanding public commitment to reducing disparities in opportunities among historically underserved students and their more advantaged peers. In 2020, the board revised a policy originally passed in 2010 to assert that "addressing the needs of all students, particularly those students who have been most underserved by the system … requires a commitment to equity in the opportunities provided to students and the

resulting outcomes."[2] Board member Teresa Castellanos described the way in which this policy has helped to hone the issues that the governing team chooses to take on and the ways in which the team seeks to deepen prior commitments: "The most important thing we have is our discussion on equity and how that gets applied, whether it's the budget, whether it's the discussion on ethnic studies, whether it's the way we grade, and so we keep building on things versus going back and having to reconstruct or fighting over things."

In NVUSD, an annual process of selecting four to six annual priorities helps to further narrow the focus of the district's decisions. Interview respondents described the approach as a collaborative endeavor that involves the superintendent, board, and other district leaders establishing the most important issues requiring the governing team's attention. These topics grow directly from the strategic plan, build on priorities from the previous year, and serve to focus the team's discussions and decisions.[3] As trustee David Gracia explained, "As you go through a school year, a hundred things could come before you. You must determine, 'Is this one of those six things that we're supposed to be focused on?' If not, then maybe it takes second fiddle." The NVUSD team reinforces its commitment to these areas of attention by tying them directly to the superintendent's evaluation. A mid-year check-in to monitor progress, combined with the formal annual evaluation, helps to ensure that even when competing demands for attention inevitably emerge, the board continues to emphasize the areas for growth that it has identified as most important.

Meanwhile, in a reflection of the ways in which the governing teams in both districts operate in collaboration, the superintendent uses the strategic plan to guide decision making and action within the central office and in school sites. By orienting the district's policy activity and operations around the same objectives, all members of the team support the district's commitment to the same priorities.

Priorities Enable Persistent Attention to Goals

The kind of focus described in SJUSD and NVUSD enables the districts to identify the issues that are most important for meeting their goals and to avoid chasing every concern that emerges in a complex community environment. The nature of an elected board and a public meeting format that allows for public comment can create the illusion of representative community input. Indeed, a desire to demonstrate responsiveness to this input can push individual board members and entire governing teams to address every issue that comes before them. This impulse can also lead districts to adopt symbolic resolutions that demonstrate a superficial commitment to one issue or another but do little to improve the quality of the district's actions. Responding to input in this way, however, can dilute the attention of trustees and district leaders and distract from the kinds of actions that will improve learning opportunities for students. SJUSD trustee Brian Wheatley offered this reflection: "One of the things that individuals on boards can get in trouble with is constantly pushing their agenda, whether it's resolution after resolution after resolution. Nancy's really good. She says, 'Look, we don't want to do a resolution if we can't put action behind it to make it real.'" Establishing priorities for the district and exercising discipline in making them the center of attention helps governing teams organize their work to achieve the district's goals.

> "'Is this one of those six things that we're supposed to be focused on?' If not, then maybe it takes second fiddle."

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1. See, for example, Devarics and O'Brien (2019), Maricle (2014), and Delagardelle (2008).

2. San José Unified School District. (2020). *Policy 0415: Equity.* https://simbli.eboardsolutions.com/Policy/ViewPolicy.aspx?S=36030421&revid=qPUCXkpsAnpjZOzadqGH0g==.

3. For example, one of the district's six annual priorities for 2023–24 sharpens the attention of a broader strategic plan goal around student learning, achievement, and success: "Improving and targeting mathematics support and progress during key transition years 2nd to 3rd, 5th to 6th, and 8th to 9th."

Facilitating Effective Governance Through Commitment to Shared Norms

Without a shared understanding of how members of a governing team should interact with one another, individuals can divert attention from district priorities and even undermine progress by pursuing their own agenda or responding to community requests without consulting with colleagues first. Interview respondents described the ways in which commitments among the superintendents and board members in NVUSD and SJUSD are essential to their effectiveness. Here, we identify several of the shared norms that emerged consistently across the two districts.

Clarifying and Respecting Roles and Responsibilities

Dysfunctional boards often have at their root a misunderstanding of the role that trustees play in the work of school improvement. Indeed, a review of the literature on effective school boards found that "poor governance is characterized by factors such as micro-management by the board; confusion of the appropriate roles for the board member and superintendent; interpersonal conflict between board chair and superintendent; and board member disregard for the agenda process and the chain of command."[1] The onboarding activities in SJUSD and NVUSD seek to avoid these challenges by establishing clear expectations from the outset. Activities throughout the year serve to reinforce role clarity in both districts and avoid disruptive behaviors that could otherwise distract district leaders from the priorities that drive their work. Other norms both (1) underscore the respective responsibilities of district administrators and school board members, and (2) ensure that governance team interactions facilitate progress toward district goals.

> We come from a perspective that if the board is going to do hard things like close schools, they need to understand why.

Ensuring That Board Members Are Knowledgeable and Informed

The norm articulated most frequently in both NVUSD and SJUSD was a commitment to ensuring that board members are knowledgeable and informed.

Superintendents Mucetti and Albarrán expressed a strong belief that board members need to deeply understand the issues (and their contexts) if they are to make responsible decisions as members of a governing team. As Mucetti explained, "We come from a perspective that if the board is going to do hard things like close schools, they need to understand why—so a lot of information and data" are critical. As publicly elected officials, board members also have their own desire to appear informed and equipped to cast consequential votes on behalf of the district's students. Using a phrase employed by each of the SJUSD trustees, Albarrán described this as a philosophy of "no surprises": "The more you tell them, the less you'll have to tell them" later on when information and concerns arise through other channels.

"We share a lot of information. I am committed to making sure the board is prepared at meetings."

Trustees in both districts echoed the superintendents' descriptions of relationships characterized by frequent communication. NVUSD board member Julianna Hart described Mucetti as "very involved. She's been at every meeting. She's been extremely transparent and helpful in terms of answering questions." SJUSD's Brian Wheatley offered a similar perspective about Albarrán: "This idea of no surprises, we try very hard to make sure that if we have a concern, we reach out to Nancy and we let her know, because she's the one person we're supposed to be connecting with. And then sometimes she'll connect us depending on what the issue is. … So, she's very good."

> We owe it to the citizens who elected us not to fight, and to the kids that we're looking out for to move forward.

The same commitment also extends to the board's relationship with district staff. Public meetings are an opportunity to share information about the district's plans and progress and to address questions about the work. However, board members do not see them as vehicles for scoring political points by attacking or surprising district leaders. NVUSD trustee Eve Ryser, for example, described the rationale behind the district's deadline for submitting questions for a public meeting by saying, "We're not catching any staff member off guard with some question that they're not prepared to answer."

Treating One Another With Respect

Members of the governance teams also described a commitment to treating one another with respect. First and foremost, they recognize and value one another as human beings. Interview respondents from both districts described appreciating the fact that their colleagues had volunteered for a leadership role to improve the prospects for young people in their communities. Interactions among board members therefore begin from a place of respect. Some respondents further expressed a responsibility as elected officials to model healthy interpersonal behaviors. NVUSD trustee Julianna Hart shared, "It's very much like what you try to teach little kids in school, like raise your hand, wait your turn, say thank you, please, thank you, all those niceties. … We're all here to represent the public. We're all here in the best interest of the kids. Let's focus on that and then build from there." Fellow board member Cindy Watter added, "We owe it to the citizens who elected us not to fight, and to the kids that we're looking out for to move forward."

This commitment to respectful behavior becomes especially important in the face of disagreements. According to SJUSD trustee José Magaña, "We understand when we disagree, it's okay because I know who you are as a person, and I care about you as a person. And that actually makes disagreement even easier because we understand it's temporary, and then we can keep working." NVUSD board member Elba Gonzalez-Mares added, "I think when we have those dialogues that it's open, really open, honest conversation in a professional, respectful way. Then we can respectfully and professionally disagree with each other in the boardroom when we're making decisions that impact our students."

Operating as a Collective Body, Not a Collection of Individuals

One manifestation of a commitment to respect in the face of disagreement is embracing and supporting board decisions regardless of individual opinions about the votes. "After a decision is made," explained SJUSD board member Carla Collins, "whether we voted for it or against it, if it passes, it's a policy of the board that we stand by. There's an understanding with the board members: the item is done and that's how it went." Trustee David Gracia described a similar approach in NVUSD: "That's part of our norms too. Once the decision is made, you have to embrace that this is the voice that the board has spoken in. That's the way." In fact, one of the district's governance team norm reads, "We support Board decisions once they are made." Split decisions in the two districts do not fester as issues to relitigate or grounds for resentment—the norm of mutual respect enables board members to move forward and work together on the next problem.

> "It's open, really open, honest conversation in a professional, respectful way. Then we can respectfully and professionally disagree with each other in the boardroom when we're making decisions that impact our students."

Embracing the Responsibilities Associated With School Board Membership

Trustees in the two districts also described a commitment to embracing the responsibilities required by their roles. Respondents emphasized that contributing to a high-functioning board demands an investment of time. Although opportunities to visit schools and honor the accomplishments of exceptional students, teachers, and administrators can provide inspiration and energize board members, other aspects of the job are less glamorous. According to SJUSD trustee Brian Wheatley, "As a public servant, you want to get in, you want to do good, and it's just the reality of [being on the board means] it takes a while. It's a slog."

However, the willingness to embrace the time-consuming aspects of board membership, including the level of preparation required to make consequential decisions and build a strong team, enable the governing teams to thrive. Superintendent Mucetti described the NVUSD trustees as "really willing to put in a lot of time and get knowledgeable. The challenges that we're confronting today—which are also our opportunities for growth—the only reason we can even have these opportunities for growth or challenges is because of their willingness to do such hard work. They put in a lot of time beyond just preparing and showing up for a meeting." CSBA's Luan Rivera adds, "The success that you are seeing with [NVUSD] is the fact that they do this work constantly, that they're paying attention to the way that they work together and their collaboration, their relationships."

In describing their board responsibilities, multiple respondents from both districts described the modestly compensated role of a trustee as a part-time job. Most of the SJUSD trustees who provided a concrete estimate of their time commitment indicated that board responsibilities required 10 hours per week. In NVUSD, although variation exists, trustees indicated that it is common to dedicate 20 hours per week to their work in the district. Not everyone who cares about the direction

of the district in their community would be willing or able to provide this level of service. The fact that these board members embrace that time as part of their obligation as elected officials, however, enables them to live up to the potential of their roles.

Articulating Additional Norms

Other norms further specify the kinds of commitments that members of the governance teams make to one another. In NVUSD, this takes the form of a governance handbook.[2] The 10-page document lays out the purpose and roles of the governing team and specifies protocols that board members should follow, for example, in visiting a school site. One portion of the handbook also identifies norms to which the team commits. Examples include "We listen actively and with empathy" and "We maintain the confidentiality of all privileged information." Whenever board elections result in a change in the composition of the governance team, the team updates the handbook; the superintendent and all board members then sign the handbook to signal their commitment to the agreements articulated within it. To keep these norms at the center of the group's interactions, the board president also selects one as an area of focus during the closed session of each board meeting.

Holding One Another Accountable for Their Commitments

Board members in these two districts emphasized that they hold one another accountable for living up to their commitments. According to SJUSD trustee José Magaña, "We can call each other on things amongst the board, amongst staff, and it's okay because we are aligned as leaders and people." NVUSD board member Elba Gonzalez-Mares described what this process has looked like for her by saying that when "I'm not agreeing with someone, or I feel tension, I have immediately shared that with the board chair, as well as with Dr. Mucetti. And what's great is that the initial reaction is what our handbook says: What's happening here? What's the expectation? So that it gives us the talking points for the board chair, and even myself, to mention that to the fellow trustee if they're falling behind." Mucetti added her own observation of this process by noting, "What's great about it is I don't have to redirect behavior. Board members redirect other members." Because members of the teams in both districts are willing to address behaviors when they stray from the group's norms, they help to ensure that these norms play an active role in guiding those patterns of interaction.

> "The only reason we can even have these opportunities for growth or challenges is because of their willingness to do such hard work."

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1. Devarics and O'Brien (2019), p. 6.

2. The handbook is publicly available through a link on the board of education's website (https://www.nvusd.org/about/board-of-education) that says "NVUSD Governance Handbook."

Managing Effective Governance From the Superintendent's Chair

Districts cannot accomplish coherence through board policy alone. The interconnectedness of strategies, departments, and people relies on the daily leadership of educators in the central office and at school sites. The superintendent is therefore uniquely equipped to bridge policy leadership from the board with operational leadership from the central office. For this reason, literature about effective school boards underscores the importance of collaboration between superintendents and board members.[1] Interviews highlighted ways in which leadership from the superintendents in NVUSD and SJUSD helps to create the conditions for a high-functioning board.

In both districts, the superintendent's relationship with board members begins with the onboarding process (see Preparing Trustees to Succeed Through a Strategic Approach to Onboarding). Additional steps throughout the year help to foster productive collaboration.

> She'll tell us the good and the bad, which is what we need. To make good decisions, we need to know both sides of the story.

Ensuring Proactive and Effective Communication

Interview respondents emphasized the importance of effective communication between the superintendent and board members. The extensive information sharing described earlier—in SJUSD, expressed as a philosophy of "no surprises"—relies on the superintendent's commitment to connecting with board members proactively, frequently, and in easily accessible ways. Trustee Carla Collins talked about approaches Nancy Albarrán uses to facilitate discussion when issues arise: "She's amazing on texts, she's amazing on email response, and we will set a call just to check in if something's a big issue or a hot issue that can't wait for our next meeting." CSBA's Luan Rivera offered a similar assessment of Rosanna Mucetti, connecting her skills not only to effective board relationships but to engagement with members of the district community: "Rosanna is a fabulous communicator. She has a wonderful ability to communicate even really difficult decisions out to the community and help them understand why they were important."

The approaches in SJUSD and NVUSD, especially as they relate to information sharing, stand in contrast to the advice many superintendents receive to keep board members at arm's length in order to avoid micromanagement and straying from the board's intended policy role. Both superintendents, however, describe a bias toward transparency to ensure that trustees are equipped to make thoughtful decisions. According to NVUSD trustee Lisa Chu, "It's very candid. She'll tell us the good and the bad, which is what we need. To make good decisions, that's what we need. We need to know both sides of the story."

Board members and superintendents in both districts acknowledged the risk that accompanies this level of transparency. Trustees' access to information makes superintendents vulnerable. Board members could choose to publicly share information provided in confidence to expose flaws in the system or score political points.

For Albarrán and Mucetti, however, the ability to cultivate trust among members of the governance team and to prepare trustees to make responsible decisions justifies their approach. Arguably, that level of trust makes it less likely for board members to abuse the privileged information to which they have access.

Cultivating Relationships With Board Members

Underlying effective communication is a priority of cultivating relationships with board members. Beyond scheduled board responsibilities, respondents in both districts provided examples of formal and informal one-on-one check-ins, school visits, and other events that enable superintendents and individual board members to learn about the work of the district together. According to NVUSD board member David Gracia, Superintendent Mucetti "has a great relationship with all of the people on the school board. She puts effort and time into cultivating that relationship."

Part of the relationship building involves understanding the priorities and areas of expertise each trustee brings to the table, and connecting that personal background to the work of the district. Both superintendents described their efforts in this regard. Mucetti spoke of the importance of "getting to know them as individual people, seeing them as people, knowing what their needs and educational interests and drivers for being on the board are. And by really understanding that deeply, it really then drives my contact strategy." Albarrán articulated a similar approach, relaying the advice she had received from an experienced superintendent when she first stepped into the role: "Find out, what are their passions and what are their buttons? What are the things that they're really passionate about? What are the things that drive them crazy? What are things in the system that they are dissatisfied with?" As an example, Albarrán described ways in which she listens for what trustees speak about during board meetings, then schedules school walkthroughs with them so that the board members can better understand the district's work in those areas and speak knowledgeably about them from the dais. "I take them to the nucleus of the system," she explained. "You're going to be making decisions for the system. Let's talk about the curriculum at the board meeting. Let's go look at the curriculum. Let's watch it in action together, and then let's talk about it in public at the board meeting."

> Our superintendent has also taken that intentional time of building relationships with the board to tap into their strengths and areas of focus and what they want to accomplish, and [has] built our work around that.

Insights from board members reflect the ways in which their superintendents' approach to relationships development lands with them. NVUSD trustee Robin Jankiewicz explained, "She knows what we do well. She knows what our sensitivities are. She knows what we have empathy for. She knows those things we might not understand as well as another trustee. If there's something that's coming up where I may have some knowledge weakness, then she might spend more time with me." SJUSD's José Magaña offered a similar assessment of Albarrán, saying, "Our superintendent has also taken that intentional time of building relationships with the board to tap into their strengths and areas of focus and what

they want to accomplish, and [has] built our work around that and our strategic plan and goals."

Coaching Trustees to Navigate the Political Aspects of Their Role

The accounts of governing team members in SJUSD and NVUSD highlight many of the advantages of working collaboratively. For board members in elected positions, however, there are often unavoidable political pressures. Saying no to requests that fall outside of a district's priority areas can help the district maintain focus, but it can also result in constituent dissatisfaction and public criticism. To preserve cohesion in an environment with competing pressures that can affect trustees' tenure and personal well-being, superintendents can empathize with the tension that board members experience. They can also collaboratively identify ways to support each other in messaging and navigating the political dynamics of board service.

> She puts effort and time into cultivating that relationship.

Dedicating Time to Board Management

The amount of time both superintendents dedicate to cultivating relationships with board members reflects the priority they place on this aspect of their role. Mucetti estimated, for example, that board management takes approximately one quarter of her time. This kind of commitment is not inherently a good thing. The dysfunctional board dynamics of another district might force a superintendent to manage issues with trustees in ways that distract from the core work of teaching and learning. Indeed, Albarrán described her interactions with board members as less time consuming than Mucetti did. In both districts, however, superintendents see their engagement with board members inside and outside of official settings as essential to maintaining focus in the district's work and equipping the governance team to most effectively navigate issues on behalf of students, educators, and members of the broader community.

NOTES

1. See Devarics and O'Brien (2019), Ford (2013), and Resnick (1999).

Navigating Controversy in the Community

Controversial issues can consume the attention of school boards and derail efforts to advance key district priorities. Differences of opinion are a given in any large community, but if districts are to maintain focus, a body of elected representatives must find ways to navigate that disagreement. Interview respondents acknowledged that this dynamic is baked into the trustee role. According to SJUSD board member Carla Collins, "You're never going to make everyone happy. No matter what you do, there's going to be someone who is going to be angry."

> You're never going to make everyone happy. No matter what you do, there's going to be someone who is going to be angry.

Aspects of the context in which both districts operate can create fertile ground for disagreement. For example, the nature of the SJUSD and NVUSD communities brings a range of experiences and priorities for parents and families. District leaders in SJUSD describe district boundaries that encompass three distinct regions: a more affluent community in the south, a middle-class environment toward the middle of the district, and a northern portion that features a robust immigrant population and more limited resources. Similarly, board member Cindy Watter described a bifurcation of family experiences by saying, "In Napa, we are a split personality. We've got the haves and the have nots and [a] very rapidly dwindling middle class." Beyond these demographic realities, current events at the local, state, and national level can spark intense reactions from the broader community.

> Having public courage is really hard. It's remembering that there's 30,000 kids in a system. If you're going to say yes to one person, can you say yes to 29,999 other asks?

Persistent frustrations with how districts handled the COVID-19 pandemic, for example, often shaped people's opinions on public education and the vigor with which they expressed them.

In an environment where some degree of controversy is inevitable, the superintendents' proactive steps to keep board members informed in NVUSD and SJUSD have been vital for making difficult decisions. Interview respondents described additional ways in which both districts maintain focus and aim to vote responsibly.

Courageous Board Members Can Make Difficult Decisions

Equally important to being well informed is the willingness among board members to make courageous decisions in the face of controversy. Some of the confidence to cast votes that are unpopular with segments of the community comes from a sense of obligation to advance the best interests of the district and its students. As NVUSD trustee Lisa Chu explained, "We have to think about a larger context. And the driver is always our 16,000 students, is that we have to prepare them for the future." Superintendent Albarrán referenced this commitment while describing the slippery slope of catering to an especially vocal individual or group. "Having public courage is really hard," she observed. "It's remembering that there's

30,000 kids in a system. If you're going to say yes to one person, can you say yes to 29,999 other asks? And I think that that's the question they have to constantly ask themselves. If you do this now, can you do this for everybody that's in that situation?" NVUSD board member Eve Ryser emphasized that the mindset of serving the district's best interests outweighs even the stability of an individual board member in their role: "If I end up with a challenger … and if I lose—if I run again—because I made decisions that came back to haunt me in that way, then so be it. My job is to do what I judge to be the right thing for the entire school district."

> The more transparency we have, the more understanding the parents will have in why we do what we do.

Effective Communicators Can Engage With Community Members About Decisions

When difficult decisions are necessary, members of the governance teams in both districts described a commitment to communicating proactively with community members. This approach to communication begins with active listening to better understand people's opinions and the rationale behind them. According to NVUSD board member David Gracia, "You have to have a good process and enough community engagement that people can understand the data and the reasoning behind what's happening, and that they … feel like they've been given a chance to be heard and, in some cases, to be involved." Seeking opinions in this way serves two purposes. First, it invites community members to share their perspectives and ideas in ways that, when appropriately armed with the facts of the matter, can improve the decision-making process. Second, students, teachers, parents, and other constituents may be more likely to accept and even support a board vote if they believe they had an opportunity to contribute to the process.

Communication about the facts behind the issues facing the district is also a key responsibility for trustees, especially when it requires dispelling misconceptions that have emerged about a topic. NVUSD board member Lisa Chu explained, "We have to educate our parents about what is going on in the district. We have to be transparent. And the more transparency we have, the more understanding the parents will have in why we do what we do." Some trustees even described their willingness to meet directly with constituents to listen to and address reactions to their decisions. "I have made it very clear in public forums on social media that I will do one-on-ones. I do a lot of one-on-ones," shared NVUSD trustee Robin Jankiewicz. However, she cautioned, "That's not something I would encourage every board member to do. I waited to do this until my children were older so that I could have the time."

In addition, the norms that guide patterns of interaction among board members also apply to trustee communication with community members. "I was pointed towards the board policy handbook [by another member of the governance team], which was extremely useful," relayed NVUSD board member Cindy Watter when recalling unfavorable reactions she has received about her votes. "When someone calls you up screaming, you really want to jump in, but there's a way to do that and there's a sensible way to do that that's more in an organized fashion." Cohesiveness among board members also helps trustees to prepare for and weather any pushback. According to CSBA's Luan Rivera, "When you're a strong team and you've adopted these norms and

protocols and agreed to work together, it makes it easier to stand together to face those controversial issues. If the team is not in a good place to begin with, that makes it even harder."

Examples of Controversial Decisions

Recent board votes about high-profile and highly charged issues illustrate the kinds of controversies that can emerge in a district and ways in which the approaches to governance in SJUSD and NVUSD help the governance teams weather the storms.

School Closures in Napa Valley USD

The decision to close schools is one of the most difficult ones a school district can face. For parents, a school closure creates logistical challenges that can include longer commutes, plus the social upheaval associated with their children's separation from friends and teachers. Similar obstacles often emerge for educators who may need to move on from longstanding relationships with colleagues, families, and the culture and expectations of a particular school site. Perhaps the most impactful loss, however, is the emotional tie to a building, a shared history, and a set of relationships that unite a community.

In 2019, financial struggles in NVUSD were threatening the district's ability to deliver on its commitments to students, and maybe even to remain solvent. Meanwhile, trends of declining enrollment resulted in multiple schools whose student populations and the resources they generated through state funding were insufficient to maintain the facilities and personnel required to operate the schools. Projections of continued drops in the student population meant that the already unsustainable fiscal dynamics regarding these schools were likely to get worse, not better.

In response to these harsh realities, district leaders and school board members concluded that it was necessary to shutter multiple schools. Opposition to this decision was predictably intense. A petition to keep one of the schools open characterized the district's approach as "beyond insensitive" and "cruel."[1] Nevertheless, in October 2019, the board voted 6–1 to close Mt. George Elementary School and 7–0 to close Yountville Elementary School. A subsequent 7–0 vote in April 2021 approved the closure of Harvest Middle School and the reprogramming of River Middle School into a new Spanish dual language and arts integration middle school academy, renamed Unidos Middle School.

Board members recognized the gravity of their decisions. Cindy Watter bluntly described the community reaction: "Closing schools is very traumatic. People don't like doing it." Eve Ryser added, "We had to execute on school closures, which is certainly a topic that raises the temperature and cuts to the heart of community members. And I understand it because I was a parent and am still a parent in this school district too. I understand the sort of loyalty and emotional aspects of school closure and how that lands."

Nevertheless, trustees described themselves as being exceptionally well informed and confident in their decisions. David Gracia referred to the reality of schools that were simply too small to maintain: "We just didn't have the money and had to eliminate some of our smaller schools." Lisa Chu connected the board's vote to a broader commitment to the best interests of the district by posing a question she considered: "How does it impact everybody else at that time if [the continued operation of under-enrolled schools] was to continue? And so, when you are able to put it in that perspective, it gives you a different kind of clarity around how to make those decisions." Elba Gonzalez-Mares explained the board's mentality by saying, "We all

had just the tremendous confidence in the way we were voting" despite a great sense of empathy with the community.

Several factors enabled the decisions to unfold in the way they did. District staff did extensive research on the challenges and the options for moving forward—informed by the enrollment projections of a professional demographer hired as a paid consultant—then presented them to the board and the community. Trustees described one-on-one conversations they initiated with the superintendent to understand the situation and explore alternatives. A committee of community members convened to examine the options as well. When it came time to vote, board members were willing to make difficult decisions they believed to be in the best interest of the district, then stand by those choices in their community interactions; two trustees described one-on-one conversations they held with community members to discuss the decisions. Summarizing the connection between being well informed and standing by controversial votes, Robin Jankiewicz concluded, "I do wear it as a suit of armor. I am not afraid to have any conversation. I don't have a conversation unless I understand the information. I am more than willing to say, 'I don't know,' but it is rare that I feel that I have not been given enough data or an opportunity to ask all the questions predicated on that data before I go public."

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Police Presence in San José USD Schools

Many school districts have a long history of contracting with local police departments to provide security on school campuses. District leaders in these places, SJUSD among them, see the partnerships as an opportunity to ensure a safe learning environment for students while freeing teachers and administrators to prioritize matters of teaching and learning—especially in the face of the increasing gun violence that has become one of the leading causes of death for youth.[2] Critics of these relationships, however, express concerns about promoting a punitive approach to school attendance and discipline and about the bias that can characterize police–student interactions and can disproportionately impact students of color.

These opposing viewpoints came to a head in June 2021 when the board voted on a memorandum of agreement with the City of San José regarding San José Police Department (SJPD) services on school campuses. A petition launched by a group of advocates charged that "the presence of police officers in schools is incredibly detrimental to both the physical and mental health of our Black students and other students of marginalized identities."[3] In contrast, district leaders reported that the formal and informal data they collected did not support the removal of police; in particular, Nancy Albarrán shared that secondary principals "were adamant that this is the support that they needed." Board meeting minutes indicate that nearly three quarters of the public comments between January and June 2021 addressed the SJPD issue, with 56 individuals registering their opinion on the day of the vote.[4]

Faced with a controversial issue that touched on philosophical views about the learning environment for students, commitments to equity in adult–student interactions, and the logistical dynamics of ensuring

safety on school campuses, the SJUSD board voted 3–2 against the memorandum of agreement regarding the SJPD, resulting in the removal of SJPD from the district's schools. The board decision resolved little of the tension that preceded it. As trustee Carla Collins recalled, "There were tons of people protesting having police on campus. And then afterwards, there were tons protesting that we had removed them."

> Once trustees were able to listen to one another, then we also understood.

The disagreement within the board tested the relationships among members and forced members of the governance team to lean heavily on their norms. Wendi Mahaney-Gurahoo recalled Nancy Albarrán shepherding conversations about communication and revisiting "our norms and how we were going to be with each other." Part of the subsequent discussion pushed board members to seek and understand the perspectives of their peers to understand their motivation and their vote. Mahaney-Gurahoo continued, "We were frustrated the other person voted that way. We were like 'How could you?'" Once trustees were able to listen to one another, however, "Then we also understood."

Also noteworthy is what happened in the aftermath of the decision. The governance team has continued to respond to evidence about the impact of its vote and has taken steps to ensure that the board revisits the issue until it arrives at a solution that works best for all members of the district community. After receiving pushback from principals about their struggles in the absence of an SJPD presence, the board amended its decision in August 2021 to allow the hiring of officers for extracurricular evening activities, then again in December 2021 to give principals discretion to place an officer on campus if they believed it to be appropriate. Meanwhile, a 13-member committee composed of teachers, board members, parents, and students has been studying the issue to bring back recommendations for how the district should navigate the SJPD presence on its campus moving forward.[5] The board's reaction reveals that its members are not blindly committed to a particular ideological point of view.

Public Criticism Takes a Toll

Despite these positive examples and trustees' insights about them, interview respondents described the harm that results from repeated public criticism. SJUSD trustee Teresa Castellanos recalled, "I've been called stupid. I've been flipped off in public and my life has been threatened. … I remember one time I encountered 69 times where I was called stupid in the height of the pandemic." SJUSD board member Wendi Mahaney-Gurahoo shared similar experiences: "I wasn't ready, I think, for the amount of vitriol, the amount of personal attack. … I'm just trying to help and donate my time, for the most part. I wasn't really ready to be called an idiot and a moron as much as I'm called, although I'm used to it now." These disturbing experiences call for a public that exhibits more empathy and respect for a group of elected officials who are volunteering to improve the system that serves the students and families in

> I wasn't really ready to be called an idiot and a moron as much as I'm called, although I'm used to it now.

the district community. They also highlight the need for board members to protect their own mental and emotional health. Establishing expectations for what their elected office is likely to entail, then ensuring appropriate personal support structures to weather rough patches in their tenure, may enable board members to navigate the highs and lows of the district's journey and facilitate the sustainability of their role.

NOTES

1. The "Stop NVUSD from CLOSING Harvest Middle School!" petition originally started in October 2020 is available at https://www.change.org/p/parents-stop-nvusd-from-closing-harvest-middle-school?source_location=search.

2. See Roberts et al. (2023) and Santa Clara County Public Health (2022).

3. The "Police out of San José Unified Schools!" petition originally started in July 2020 is available at https://www.change.org/p/san-jos%C3%A9-unified-school-district-police-out-of-san-jos%C3%A9-unified-schools.

4. SJUSD board meetings are not typically characterized by a high volume of public comments. The average number of comments per meeting on all topics between January and May 2021 was 18. The average number of comments per meeting on all topics during the 2022–23 school year, when the board was not slated to vote on the SJPD issue, was 13. Analysis based on meeting minutes available at this link: https://simbli.eboardsolutions.com/SB_Meetings/SB_MeetingListing.aspx?S=36030421.

5. For resources associated with the Advisory Committee on Use of SJPD Officers, see https://www.sjusd.org/about/advisory-committees-groups/advisory-committee-on-use-of-sjpd-officers.

Weathering Threats to Productive Governance

Individuals inside and outside the governance teams in NVUSD and SJUSD characterize the operation of their school boards as highly effective. The deliberate and sustained steps taken by superintendents and board members alike to create the conditions for success have enabled strong practices and cultures to take hold. Nevertheless, the broader context in which school districts operate increasingly reflects our polarized political landscape, and some see school boards as platforms for disruption and ideological grandstanding. Members of the governance teams in both districts offered their reflections about the prospects for stability in the current environment.

Strong Commitment to Norms Can Help Withstand Disruptive Forces

Interview respondents described ways in which the norms that guide the districts' work could help the board withstand disruptive forces. "If someone like that were to win on a get-rid-of-incumbents-and-restart [platform], it would be difficult," predicted SJUSD board member Carla Collins. "That's when process really is more important than ever, because it allows us to have those guardrails so that it doesn't become a train wreck. I would hope that those would hold up in that [scenario] and still work." NVUSD trustee Julianna Hart reflected on how an established board culture makes it easier to maintain an existing approach of civility and productivity, saying, "I came onto a board that already had all those things, so it was really easy. I didn't come into a room where people are screaming at each other or any kind of chaos at all, so it's been great. It's really given us an opportunity to just kind of calmly look at the issues and have those conversations." In recognition that any change of direction for the district requires a board majority, multiple respondents expressed confidence in the strength of the governing team to withstand a deliberately disruptive addition—and even the possibility that demonstrating the value of collaborative governance can create converts toward more respectful and productive behaviors.

Governance Teams Are Vulnerable to Disruptive Forces

Nevertheless, multiple respondents acknowledged the threats that could emerge from the election of board members who are unwilling to commit to shared expectations for behavior. According to SJUSD Superintendent Nancy Albarrán, "A change in the trustees would definitely change the dynamic. Or one of them leaning toward their own agenda, not making decisions that are in the best interest of the district or our equity policy. That would be really hard, I think, too. Not impossible to navigate, but I would say definitely disrupting our current synergy." NVUSD Superintendent Rosanna Mucetti pointed specifically to the changes that could take place if a majority of the board membership opposed the current approach to governance: "If I lost that majority of willingness to commit [to the board's shared set of norms] and all of a sudden you got three or four [of a seven-person board] that are not

> "If I lost that majority of willingness to commit, this system becomes really vulnerable and things could dramatically change in a heartbeat."

willing, this system becomes really vulnerable and things could dramatically change in a heartbeat."

This vulnerability has implications for multiple members of a school community. For members of the governance team, ongoing commitment to the group's norms helps to ensure the continuing effectiveness of the team. Modeling these norms through behaviors on the dais and in interactions with community members, and actively calling attention to the board's approach, may be just as important in building awareness and appreciation of that approach. For members of the public, voting behaviors can reward candidates who are willing to work together and solve problems on behalf of the district's students, educators, and families—or they can encourage disruption. This does not necessarily mean that all incumbents should be perpetually retained, nor that change is undesirable. However, responsible voters should recognize the difference between a candidate who can promote improvements and shifts in strategy, when appropriate, in the best interests of students while working as a productive member of a team and a candidate who works as an individual to bolster their own agenda.

Because it details the approaches of two districts that have established and maintained constructive approaches to governance, this report does little more than speculate about the toxic influences that can disrupt healthy board operations. Nevertheless, anecdotal examples from around the state highlight situations in which superintendents and board members tried to pursue similar strategies to those employed in NVUSD and SJUSD but failed to realize their goals because the full governing team did not share the same commitment. These stories highlight the importance of the buy-in from both board members and superintendents that characterizes the work in the two districts. It also underscores the critical role that voters play in recognizing and rewarding behaviors that foster productivity. To the extent that the K–12 education field in general, and districts within their own communities, can illuminate ways in which effective governance better serves students and families, it may encourage the election of candidates who are willing to prioritize solutions over disruption.

Lessons for Other Governance Teams

The approaches in NVUSD and SJUSD have emerged from the histories and contexts of their own communities. Any effective governance team must recognize and address their local assets and challenges, and the result will necessarily take a different form from district to district. Nevertheless, the similarities between the districts suggest that there are lessons that can enhance the productiveness of any school board.

Constantly Work on Governance

Perhaps the first and most important lesson from SJUSD and NVUSD is that governance is a continuing priority that requires constant attention and care. The practices of effective governance do not happen automatically, and they do not persist through transitions without explicitly attending to the commitments that make them possible. According to NVUSD Superintendent Mucetti, the team is "constantly breathing life into roles and responsibilities. … That's a dance we are constantly in." SJUSD trustee Teresa Castellanos articulated a similar perspective, saying, "Even for a really strong board, it's important for us to have … facilitated discussions, to have sessions where we're learning something together, because we have to keep working on that, always." Governance is not merely an initial step before the "real work" can happen; governance itself is part of the real work that will enable other aspects of the system to thrive.

> Governance is a continuing priority that requires constant attention and care.

Establish a Shared Vision and Set of Priorities

Coherence requires a clear direction for what the district aims to accomplish. Any effective governance work starts with a shared understanding of and commitment to a vision and a set of priorities for achieving that vision. Once established, these priorities can serve as the anchor for the way a school board organizes its work. They can guide responses to requests, questions, and concerns. They can determine where and how a district invests its resources—including time, people, and money—and, just as importantly, where and it when it says "no." The best way for a district to maintain focus is to establish at the outset where that focus should be.

Attend to Relationships

Superintendents and trustees should prioritize building strong relationships with one another. Although each member of the team occupies an official role, each is a human being. By getting to know one another as people, including motivations, priorities, and strengths, board members and superintendents can better understand and respond to the issues each person identifies as important and their rationale for favoring a particular course of action. Superintendents can align their communication and the opportunities for board leadership with the strengths and interests of specific trustees. Moreover, developing relationships early in the process of cultivating a governing team helps to build the trust necessary to do this work well.

Agree on a Set of Norms

A governance team comprising the superintendent and board members should agree on a set of norms for the ways in which members of the team work together. This could take the form of written norms, as it does in NVUSD, but it does not have to. The bottom line is that everyone must understand and commit to the same expectations for interaction, behavior, and decision making. The experiences in both districts suggest that embracing and modeling respectful behavior may be especially important for the effective operation of a school board.

Ensure That Board Members Are Sufficiently Informed

Superintendents should ensure that board members are sufficiently informed to make consequential decisions and explain them to the community. In SJUSD and NVUSD, the superintendents have embraced a philosophy of transparency in their communication with trustees. They accept the risks that come with disclosure because they believe it enables a more productive team. Even in districts where superintendents draw a clearer line between policy and operations, board members need to know enough to vote responsibly on matters of importance to the community and to stand by board decisions even in the face of controversy. Maintaining focus in district decision making requires that they be equipped to do so.

Pursue a Thoughtful Approach to Onboarding

Ensuring knowledgeable trustees starts the moment each new member joins the board. When new trustees join the governance team, districts should begin with a thoughtful approach to onboarding that helps them understand their roles and positions them to be successful. Beyond the administrative requirements to qualify for the ballot and the steps needed to win an election, board members step into their roles without any prerequisite knowledge, skills, or experience. As a consequence, candidates' visions of what it means to be a trustee can vary widely. Effective governance begins by setting clear expectations and preparing board members to meet those expectations. By establishing a strong foundation through a thoughtful orientation to the district and the trustee role, districts can help get everyone on the same page and moving in the same direction.

> It is possible when things are done the right way with intentionality, with planning, with love.

Engage With Community Members

Trustees and superintendents alike should engage with community members in ways that illustrate the value of a high-functioning governance team. Candidates who promise disruption and change often appeal to voters who are dissatisfied with an existing system. By developing practices to actively seek input from the full range of community members, and not just those who are most vocal or best organized, boards can ensure that their policies address the district's most pressing needs. By communicating proactively, consistently, and patiently with community members about decisions, members of a governing team can help to demonstrate the thoughtfulness that led even to unpopular decisions. Just as important, by calling attention to their approach to governance and the norms that guide it, members of a governance team can illustrate the ways in which collaboration positions districts to do better on behalf of their

students and families. SJUSD trustee José Magaña referred to a growing group of board candidates intent on "creating chaos in the system so they can say, 'Look, the system doesn't work.'" To counteract this trend, Magaña explained, "I want folks like me and my colleagues to be like, 'Actually, it does. It is possible when things are done the right way with intentionality, with planning, with love.'"

Conclusion

Today's public education environment is one in which the threats and pressures facing school systems are increasingly pronounced. Attention paid to school boards and how they govern in recent years often highlights the kinds of dysfunction that sidetracks districts from their purpose and stated goals. Perhaps, however, the heightened awareness around board governance creates an opportunity to build understanding of the practices that can enable districts to thrive. NVUSD and SJUSD provide two examples from which board members, central office leaders, and members of the general public can learn. Through thoughtful approaches to onboarding new members, strategic steps to establish and commit to a vision for success, norms for behavior, and steadfastness in the face of controversy, other governing teams can help their districts maintain focus and better weather the storms facing today's public education systems.

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The California Collaborative on District Reform, an initiative of American Institutes for Research, was formed in 2006 to join researchers, practitioners, policymakers, and funders in ongoing, evidence-based dialogue to improve instruction and student learning for all students in California's urban school systems.

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