



# Building Effective Governance Teams

Workshop Information



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## A Message from LOZANO SMITH Executive Director, Andy Garcia

Rarely do cabinet level administrators and Board members have an opportunity to come together for effective discussion of leadership and boardmanship matters, yet we know that stability at the top is key for high performing districts. That is why LOZANO SMITH has developed a workshop specifically designed to strengthen the relationship between Board members and superintendents.

*"Building Effective Governance Teams"* develops topics that address the themes linked with successful governance. Participants will learn:

- Five elements of effective Board/superintendent relationships.
- Ten principles for handling conflict of ideas without personal conflict that hinders the decision-making process.
- Strategies for effectively communicating with the public and managing media relations.
- What every Board member and superintendent must know to avoid costly Brown Act violations.
- Key elements of the superintendent employment agreement and Board/superintendent evaluations, including facilitated evaluations and Board self evaluations.

I invite you to discover more about this innovative workshop in the pages of this brochure. Contact our Client Services department ([clientservices@lozanosmith.com](mailto:clientservices@lozanosmith.com)) for more information or to schedule a workshop. Feel free to contact me at [agarcia@lozanosmith.com](mailto:agarcia@lozanosmith.com) or 800.445.9430 if you have comments or feedback about this or any other LOZANO SMITH event.

Sincerely,

*Andy Garcia*



*Schools achieve optimal performance when there is a strong partnership between the School Board and the superintendent.*

## Introduction

LOZANO SMITH is California's premier education law firm, serving hundreds of K-12 and community college districts in the state. We are a recognized leader statewide for successful development and implementation of topical seminars designed to provide timely advice and training. We provide workshops on a variety of topics, many selected by participants, which we conduct upon request. These workshops provide school district administrators with the knowledge needed to prevent future costly legal matters.

LOZANO SMITH attorneys have developed a cutting-edge workshop, "Building Effective Governance Teams", to help Board members and superintendents enhance their working relationships. Schools achieve optimal performance when there is a strong partnership between the School Board and the superintendent. This relationship must be carefully cultivated by both the superintendent and members of the Board. We provide the keys to achieving an effective partnership in a lively, interactive program.

## Workshop Content

We know that building effective governance teams is essential to increased student achievement. In this workshop, interactive activities center on the Board and superintendent paying attention to the things that matter most, affirming the district's mission and vision, and creating structures that lead to effective implementation of strategies, policies and procedures.

An important question that is answered in this training session is: How do you effectively lead your school district in an environment characterized by changing legislation, local politics, even social pressures that manifest themselves in negative student behavior? This workshop is packed with what every leader should know to successfully navigate in an ever-changing operating environment.

The following 10 broad topics are covered in a typical effective governance workshop. We know from experience, however, that each governance team has its own individual needs. For that reason, we will customize the workshop to meet the specific needs of each school district.

- 1 Boardmanship and Teamwork**
- 2 Governance Team Meeting Agreements**
- 3 Code of Ethics**
- 4 Principles of Dynamic Deliberation**



*Board-superintendent stability is the foundation for district success.*

- 5 Governance Team Norms and Protocols
- 6 Superintendent Employment Agreements – Ideas for Administrative Stability
- 7 Board/Superintendent Evaluation Models
- 8 Public Records Act and E-mail Issues
- 9 Brown Act Basics
- 10 Media Relations

## Successful Results

Here is what past participants have said after participating in *Building Effective Governance Teams*:

*“I appreciate the triangular approach of this specific Board-Superintendent training. It included legal perspectives through legal counsel, the practical perspective from a former superintendent and the governance perspective from two current Board members. If you are looking for a succinct workshop, that offers a complete perspective on building successful governance teams, close to home, offered by local experts in the field, then I would highly recommend this training for existing and new Board governance teams.”*

**Sarah Koligian**  
**Superintendent**  
**Golden Valley Unified School District**

*“Understanding your Board’s strengths and weaknesses, as well as the norms and protocols under which you agree to operate, is the foundation and framework of a highly functioning governance team. Mike Smith and Walt Buster can facilitate a workshop in a setting that allows your team to candidly address strengths and weaknesses as well as discuss roles and expectations. Participating in their workshop is a great step in being proactive towards improving the performance of your governance team.”*

**Roger Schuh**  
**Board President**  
**Golden Valley Unified School District**

*“As superintendent of both Golden Valley Unified School District and Monterey Peninsula Unified School District, Lozano Smith has provided workshops for the school boards on developing our governance teams. I have found the workshops to be invaluable in creating an understanding of*

*our individual roles while establishing a framework for the school board and me to work together towards meeting our district goals.”*

**Dr. Marilyn Shepherd**  
**Superintendent**  
**Monterey Peninsula Unified School District**

*“We have had the fortune of having Lozano Smith do a few board workshops in our district, and I can honestly say the expertise and influence have been significant in helping us to move to an increased focus on both our individual roles and our collective mission.”*

**Richard Merlo**  
**Superintendent**  
**Corcoran Joint Unified School District**

## References

**Riverbank Unified School District**  
Dr. Ken Geisick, Superintendent  
Egidio “Jeep” Oliveira, President of the Board  
6715 7th Street  
Riverbank, CA 95367  
Telephone: 209.869.2538

**Corcoran Joint Unified School District**  
Richard Merlo, Superintendent  
Raul Lerma, President of the Board  
1520 Patterson Avenue  
Corcoran, CA 93212  
Telephone: 559.992.8880

**Burton School District**  
Dr. Gary Mekeel, Superintendent  
Devin Wilson, President of the Board  
264 North Westwood Street  
Porterville, CA 93257  
Telephone: 559.781.8020

## Faculty

Effective Governance workshops are led by two facilitators: a senior LOZANO SMITH shareholder<sup>1</sup> and an education consultant with many years of experience leading California school districts. The following individuals are the primary faculty members for effective governance workshops.

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<sup>1</sup> LOZANO SMITH is a professional corporation; hence, our principal attorneys are called shareholders.

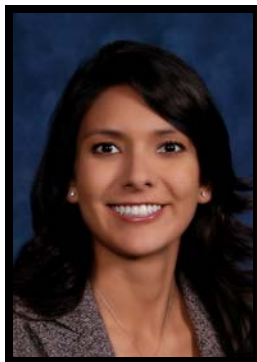


### **Louis T. Lozano**

Louis T. Lozano is a founding shareholder of LOZANO SMITH. He has been representing and advising school districts in all areas of the law for more than twenty years and has been at the forefront of important issues in education since his legal career began. He is well known for his negotiation skills in both litigation and labor relations.

Lou's roots in education trace to his early career as a high school teacher in the Oakland Unified School District. He holds a secondary life teaching credential. He received his Juris Doctor in 1975 from the Boalt Hall School of Law, after receiving his undergraduate degree in 1970 from the University of California at Berkeley.

Lou is a frequent presenter at education workshops and seminars throughout California and has presented a whole host of topics at numerous professional development conferences:



### **Regina A. Garza**

Regina A. Garza is an associate in the Fresno office. Her practice is focused on labor and employment matters, general education law and local government law. Ms. Garza has assisted school districts in certificated and classified employee terminations, layoffs and administrative discipline matters. Her practice includes labor negotiations, grievance arbitrations and the defense of unfair practice charges. She also assists clients with ADA and

liability issues, and provides advice on the Public Records Act, subpoenas, and the Brown Act.

Regina joined LOZANO SMITH after receiving her Juris Doctor degree from University of the Pacific McGeorge School of Law. While in law school, she worked full time as a law clerk with the Sacramento firm of Dreyer, Babich, Buccolla & Callaham, LLP. Ms. Garza clerked for the senior partner and was involved in the various aspects of litigation. She received the prestigious Witkin Award for achieving the highest grade in Negotiations & Settlements.



**Michael E. Smith**

Michael E. Smith is a founding shareholder of LOZANO SMITH. He is a school law attorney, an educator and a speaker. He has represented school districts for more than 27 years. In addition to his General Counsel experience, Mike offers specific expertise in matters of labor and personnel, student issues, and civil rights, as well as vast experience in the broader aspects of education law.

Mike is a past President of the California Council of School Attorneys, current President of the California School Boards Association Education Legal Alliance Advisory Board, a member of the Advisory Board to the School of Education at California State University, Fresno, and a former member of the Board of Directors of NSBA's National Council of School Attorneys. Mike has also taught Education Law at California State University, Fresno, for many years and is a former adjunct professor at San Joaquin College of Law.

Mike's talents are highly sought as a presenter on education law issues. He is a frequent speaker at national and statewide conferences, which include the National School Boards Association, the National Council of School Attorneys, the California School Boards Association, the California Council of School Attorneys, the Association of California School Administrators, and the National Association of Educational Negotiators.



**Harold M. Freiman**

Harold M. Freiman is a shareholder in the San Ramon office. He represents school districts, county offices of education, and community college districts in the areas of school facilities, property, general education law, student issues, business, and general litigation. He is a recognized leader on the topics of developer fees and school district reorganization.

Harold has received numerous awards for public speaking and has been a speaker for, among others, the California School Boards Association, the California Association of School Business Officials, the National School Boards Association, and the Coalition for Adequate School Housing. He has appeared before the California Supreme Court on behalf of the California School Boards Association's Education Legal Alliance. He serves on the Legal Advisory Panel for the Coalition for Adequate School Housing, and is a member of the California Council of School Attorneys.



### **Trevin E. Sims**

Trevin E. Sims is managing shareholder of the Los Angeles office. He represents school districts in a wide variety of areas. His practice has touched on virtually every area of public education law, including facilities and business matters, special education, student discipline, classified and certificated employee discipline, civil rights, and district reorganization.

Trevin is a member of the National School Boards Association's Council of School Attorneys and the California Council of School Attorneys. He has been a speaker for the California School Boards Association and the California Latino School Boards Association. Trevin is also a regular speaker at the firm's annual Facilities and Business Consortium.



### **Walter L. Buster**

Dr. Walt Buster is Executive Director of the Central Valley Educational Leadership Institute (CVELI) at California State University, Fresno. He volunteered as Superintendent of Fresno Unified School District in 2004. Previously, he served as Superintendent of the Clovis Unified School District, Cotati-Rohnert Park Unified School District, Tamalpais Union High School District and Fairfax School District.

Walt received his B.A. from Westmont College, his M.A. from Chapman College, and his Doctorate from the University of Montana. He spent his career as a teacher at the elementary and secondary levels, assistant principal, principal, assistant superintendent, and superintendent.

Walt is a charter member of ACSA, and directs the ACSA Superintendents' Academy in Fresno. Previously he received the Robert Alioto Award for Outstanding Instructional Leader in California and the Noted Alumni Friend of Education Award for CSU Fresno - Kremen School of Education and Human Development. In 2008, he received the Robert E. Kelly award from the Association of California School Administrators for service to the community following retirement. He is co-author of *A Practical Guide to Effective Board Meetings*.



### **Juan Garza**

Juan Garza has been superintendent of Kings Canyon Unified School District for more than seven (7) years. The District serves nearly 10,000 students in Fresno and Tulare Counties. In Effective Governance Workshops, Mr. Garza shares his success working with the members of the rural, agricultural communities he serves.



### **Ginny Hovsepian**

### **Sandra A. Bengel**

Ginny Hovsepian (left) and Sandy Bengel (right) serve on the Clovis Unified School District Board of Education. Ginny is a fourth generation school board member. She was elected

to the Board in 1991. Sandy was elected to the Board in 1993.

Community involvement is strong in Clovis schools. Prior to being elected, Sandy was involved in various district activities and was awarded CUSD's Volunteer of the Year.

Since 1993, the CUSD board has facilitated governance through the use of several sub-committees consisting of three board members. Ginny has served on the Facilities and the Budget and Finance committees. Sandy has served on the Curriculum, Facilities and Budget and Finance committees. Both women have performed the duties of president, vice president and clerk several times during their tenure. Sandy and Ginny have experience developing relationships with several superintendents.

In 2008, CUSD received the highest API score in the state for any school district testing more than 25,000 students and the 35th highest score for any unified district that tested more than 100 students.

CUSD enjoys community support as evidenced by the passage of 302 million in school bonds during Sandy and Ginny's tenure. Despite receiving less than the state average allocation per ADA, CUSD is on solid financial ground and maintains a 7% unrestricted reserve.

## Workshop Billing

For an effective governance workshop, we bill either a flat rate or an hourly rate equivalent to the standard hourly rate for shareholder legal services. Please contact us for detailed billing information.



## Summary

School district leaders must model the behavior they expect from students and teachers. In most cases this behavior does not occur naturally. The LOZANO SMITH *Building Effective Governance Teams* workshop provides proven strategies for effective working relationships. Success can be measured in student achievement.

To schedule a workshop for your district, send an e-mail to our Client Services department at [clientservices@lozanosmith.com](mailto:clientservices@lozanosmith.com) or call 800.445.9430.