Welcome to the
SCHOOL BOARD CANDIDATE ACADEMY

September 12, 2020
8:30 a.m. - Noon
TODAY’S AGENDA

- School Board Trustee Roles and Responsibilities
- Qualities of a Good School Board Trustee
- Realities of the Job
- What to Expect When Campaigning
- Conflicts of Interest / Financial Disclosure Requirements
- School District Governance Standards
- School District Budget & Finance
- Compliance with the Open Meetings Act
- Framework for Reopening Schools and Learning Continuity and Attendance Plan
SCHOOL BOARD TRUSTEE
ROLES AND RESPONSIBILITIES

Rio School District
Governing Board Members

Linda Armas, President
Eleanor Torres, Clerk
Felix Eisenhauer
Joe Esquivel
Edith Martinez-Cortes
Establishing a Vision for the Community’s Schools

- Short Term / Long Term
- Rio School District Process
- Identify Goals
- Vision guides the District direction
- Board determines where we are headed... Superintendent determines how to get there!
Maintaining an Effective and Efficient Structure for the School District

- **Board Actions:**
  Establish, maintain, oversee, set, provide, monitor

- **Superintendent Actions:**
  Implement, act, work, develop, solve, direct, facilitate, take care of...

- Oversees the adoption and development of policy
  (Curriculum & Instruction, personnel, collective bargaining, finance ...)

SCHOOL BOARD TRUSTEE ROLES AND RESPONSIBILITIES
Ensuring Accountability to the Public

- Accountable to the public for:
  - Student Achievement
  - Budget / Finance
  - Program Effectiveness
  - Progress toward Goals
  - Systems and Process
  - Superintendent Performance
SCHOOL BOARD TRUSTEE ROLES AND RESPONSIBILITIES

- Providing Community Leadership
  - Boardsmanship
  - Community Involvement
  - Visibility
  - Accessibility
  - Preparedness
  - Representation of the interests of all children
  - Teamwork!
QUALITIES OF A GOOD SCHOOL BOARD TRUSTEE

- Has a broad background of experience and knowledge or is ready, willing and able to learn quickly
- Will focus efforts on serving ALL children
- Is willing to invest the time and energy required to be effective
- Looks beyond yesterday’s solutions and yesterday’s kind of education, to provide today’s kind of education for today’s children
QUALITIES OF A GOOD SCHOOL BOARD TRUSTEE

- Understands that education today, like the world it mirrors, is extremely complex and that simplistic approaches will not meet today’s challenges
- Distinguishes between policy and administration
- Works well as a member of a team
- Respects the diversity of perspectives and styles on the board and in the community
QUALITIES OF A GOOD SCHOOL BOARD TRUSTEE

- Has an open mind and an ability to engage in give-and-take and to arrive at a group consensus
- Realizes that demeanor has consequences and acts accordingly
- Keeps confidential information confidential
- Has a sincere desire to serve the community rather than for personal glory or to carry out personal objective
A Board functions as a Board only when it is convened and having a meeting.

The Board decides ends (outcomes); Management is responsible for the means by which ends are achieved.”

- *Doing Good Even Better*  
  by Edgar Stoesz

"Wilson, about your idea of a ‘team approach’…"
REALITIES OF THE JOB

You campaign as an individual, but serve as a member of a team

- Setting the District’s Direction
- Student Learning and Achievement
- Finance
- Facilities
- Human Resources
- Policy
- Judicial Review
- Collective Bargaining
- Community Relations and Advocacy
REALITIES OF THE JOB

You do not have the authority as an individual to fix the problems you campaigned to fix

- You may participate in various activities, but remember ... You serve as a volunteer and without BOARD authority.

Your success as a board member is inextricably tied to the success of your board

- Attendance
- Be Prepared and Informed
REALITIES OF THE JOB

“The challenge of governance is to maintain the uniqueness and richness of different perspectives, while learning to listen, value and trust the knowledge and experience of others – for the good of the whole.”

School board service and marriage: They’re much alike.

He’s a single-issue member.
WHAT TO EXPECT WHEN CAMPAIGNING

Know Why You Are A Candidate

- Craft a clear and concise message
- Share your message with supporters
- Prepare for questions
- Admit when you don’t have the answers

Ask For Help!

- You Can’t Do This Alone
- Beyond Friends and Family
- Find Accurate Answers
WHAT TO EXPECT WHEN CAMPAIGNING

📖 Develop Your Strategy

- Analyze your strengths & weaknesses
- Assess your resources & capacity

📖 Get Organized

- Schedule a Regular Planning Time
- Create & Keep a Calendar
- Make Progress on Multiple Fronts
- Stay Focused on What Matters Most
WHAT TO EXPECT WHEN CAMPAIGNING

Reputation / Reputation / Reputation

- Endorsements
  - Prominent people & organizations
  - Political Parties
  - Unions
  - Newspapers
  - Yard Signs / Buttons

- Letters to the Editor
  - Know the rules
  - Keep the messages focused
WHAT TO EXPECT WHEN CAMPAIGNING

Reaching Voters

- Websites / Social Media
- Meet & Greets
- Walking Neighborhoods
- Attending Events
- Candidate Forums / Debates
- Mailer$ and Yard Sign$
WHAT TO EXPECT WHEN CAMPAIGNING

- Obey Election Law
  - Know Banking & Fundraising Rules
  - Find a reliable treasurer
  - Keep Accurate & Up to Date Records

- Don’t Stop Now……after the election
  - Communicate with supporters
  - Remove & store signs
  - Complete financial requirements
Don’t Stop Now……after the election

Remember why you ran……

Stay involved – It’s for the kids!
CONFLICTS OF INTEREST / FINANCIAL DISCLOSURE

Political Reform Act
(Govt Code Sections 81000-91014)

Conflicts of Interest
(Govt Code Sections 87100-87500)

- State and local government should serve the needs and respond to the wishes of all citizens equally, without regard to their wealth;

- Public officials are disqualified from participating in government decisions in which they have a financial interest;
CONFLICTS OF INTEREST / FINANCIAL DISCLOSURE

- Public officials, whether elected or appointed, should perform their duties in an impartial manner, free from bias caused by their own financial interests or the financial interests of persons who have supported them;

- The Conflict of Interest Act prohibits a public official from “in any way attempting to use his or her official position to influence a governmental decision” when the official has a financial interest.
CONFLICTS OF INTEREST / FINANCIAL DISCLOSURE

Disclose Your Interests ...

- So the public can verify that your decisions will not have a material effect on your financial interests.

- To show you are not operating with a conflict of interest.

- To eliminate opportunities for corruption.
CONFLICTS OF INTEREST / FINANCIAL DISCLOSURE

Disqualify Yourself
Economic Interest in Outcome ... Real Property Nearby ... Contributor Interested in it ...

I FORBID IT.
CONFLICTS OF INTEREST / FINANCIAL DISCLOSURE

When your district wants to buy the property next door to you, can you vote “yes”?
CONFLICTS OF INTEREST / FINANCIAL DISCLOSURE

Is it OK for your District to hire your spouse after you are elected?
Is it OK for your board to vote on a teacher raise if your spouse is a teacher?

Yes, if your spouse has been employed by the district for more than one year.
CONFLICTS OF INTEREST / FINANCIAL DISCLOSURE

Financial Disclosure
(Govt Code Sections 87200 - 87210)

In addition to disqualifying themselves from conflict-of-interest situations, public officials whose decisions could affect their economic interests must also file economic interest disclosure statements (FPPC Form 700).

How Much Is It Worth?
CONFLICTS OF INTEREST / FINANCIAL DISCLOSURE

FORM 700
STATEMENT OF ECONOMIC INTEREST

- Investments - $2,000 or more
- Real Property - $2,000 or more
- Income and Loans - $500 per year
- Gifts –
  Limited to $500 per year from single source / $50 gifts must be disclosed
- Travel Payments - $500 per year
- Honoraria – Not permissible
Wait, what? Wedding Gifts???

Gifts valued at $50 or more (from reportable source) must be disclosed.

A wedding gift is considered a gift to both spouses equally; therefore, you would count one-half of the value of a wedding gift to determine if it is reportable and need only report individual gifts with a total value of $100 or more, unless a particular gift can only be used by you or is intended only for your use.
CONFLICTS OF INTEREST / FINANCIAL DISCLOSURE

FPPC - Fair Political Practices Commission
(Govt Code Sections 83100-83123)

- Enforces the Political Reform Act
- Not the Brown Act - that’s enforced by private citizens and the Ventura County District Attorney’s Office
- Fines: Up to $5,000 per violation
As costs of conducting election campaigns have increased, candidates often finance their campaigns by seeking large contributions from lobbyists and organizations who thereby gain disproportionate influence over governmental decisions;

Wealthy individuals and organizations frequently extend their influence by employing lobbyists and spending large amounts to influence legislative actions.
CONFLICTS OF INTEREST / FINANCIAL DISCLOSURE

Types of Donations to Scrutinize

- Construction Firm / Real Estate Developer
- Education Vendor
- Charter School Company
- Lobbyist / Consultant
- Education Unions
  - Teachers Union
  - Classified Employees Union
CONFLICTS OF INTEREST / FINANCIAL DISCLOSURE

What’s a Lobbyist?

- Someone who spends $5,000 or more in a calendar quarter to influence legislative or administrative action on a district issue
- Professional Lobbyist - often called “Consultants”
CONFLICTS OF INTEREST / FINANCIAL DISCLOSURE

When your biggest contributor wants your district to give him a consulting contract, can you vote “yes”? 
Audits

- The Franchise Tax Board does random audits of Campaign Committees.
- If they find a problem in your Campaign Committee disclosure, they will let you know; and if you don’t fix it, they will notify the FPPC.
- Statute of Limitations: 5 years.
CONFLICTS OF INTEREST / FINANCIAL DISCLOSURE

Penalty for Violation - Standards

- Seriousness of Violation
- Intent to Deceive Public
- Violation deliberate, negligent or inadvertent
- Your Good Faith in dealing with FPPC
- Pattern of Violations
CONFLICTS OF INTEREST / FINANCIAL DISCLOSURE

Resources:

CONFLICTS OF INTEREST
Attorney General’s Office, 2010

FAIR POLITICAL PRACTICES COMMISSION
Website: www.fppc.ca.gov
Email Questions to: advice@fppc.ca.gov
Call: 866-ASK FPPC
Understanding Roles

VALUE DRIVEN
- Beliefs
- Vision
- Priorities
- Policies

Governance Team
- Strategic Goals
- Success Indicators

WHAT

HOW

Superintendent and Staff

SKILL DRIVEN
- Strategy
- Tactics
- Techniques

SCHOOL DISTRICT GOVERNANCE STANDARDS

Sponsored
By:

Ventura County School Boards Association
What is a team?

A group of people with different backgrounds, skills, personalities and styles, with a common purpose, who are working together to achieve clearly identified goals

- Building Blocks of Effective Governance Teams:
  - Unity of Purpose
  - Clarity on Roles
  - Positive Culture
  - Supportive Structure and Process
CSBA Professional Governance Standards for School Boards

Superintendent’s Governance Standards

SUPERINTENDENT GOVERNANCE STANDARDS

As a corollary to the CSBA Professional Governance Standards, a team of California superintendents including the ACSA Superintendents Committee and the CSBA Superintendents Advisory Council has developed a set of Superintendent Governance Standards. We highly recommend that these be included as part of the Professional Governance Standards adoption.
If you have any questions, please feel free to contact:

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Please click on the link below and take a moment to complete the following survey questions.  
BREAK