

## Summary

Prior to conducting the Sedona-Oak Creek JUSD Board and Superintendent retreat, I reached out to each member and the superintendent to ask two questions: 1.) What is it that I, as a facilitator, should know coming into this session and 2.) what do you personally hope to come from the session. I spoke with all members. Based on these conversations, I was able to identify key challenges and priorities of the board that guided the rest of the content for the retreat. The focus of the retreat was resolve conflict, reflect on the key works of school boards, identify opportunities and establish board goals (separate from district goals) that would allow the board to move forward in a more productive and positive manner. All members and the superintendent were present and engaged. Below is a synopsis of what was covered under each section of the board retreat agenda.

## Setting the Stage

- **Introductions-** All participants participated in an activity where they shared their experience with the education system at various stages (child, adult, board member) and shared their ideal of what an education system looks like. This activity allowed the board to begin to understand each other's experiences and the "lenses" through which they make decisions. For example, people who saw school as a safe place or retreat may value structure and stability in schools or relationships which becomes their priority when making decisions. Those that saw school as a way to achieve and better themselves may prioritize outcomes and programs that demonstrate/promote success.
- **Norms and Expectations-** To have a space that is conducive to open dialogue, it is important to set expectations for how people will engage and behave. The board identified the following norms for the retreat:
  - Respect each other's opinions- That is their perspective
  - Listen to and consider what others are saying
  - Respect the process and the outcomes
  - Be honest AND kind
  - Take breaks when needed- People need to do what they need to do.

## Learn and Grow

- **Moving Past Conflict-** The facilitators reviewed
  - Causes of conflict:
    - Miscommunication
    - Differing perceptions
    - Differing values
    - Competing for outcomes
  - Common types of board conflict
    - Overstepping roles- Board determines what, Superintendent determines how
    - Board acting out of scope of authority- 1 of 5, no individual authority
    - Legal-Not following law or board policy
    - Ethical- engaging in behaviors that negatively impact the district

## Recap of Sedona-Oak Creek Board Retreat 6/12/18

- Consequences of board conflict
  - Poor morale, inability to attract/ retrain staff, negative impacts on student achievement, reduced enrollment, lack of community trust/support
- Addressing conflict: They only real recourse boards have is conflict resolution
  - Step 1: Stop Avoiding Conflict- Addressing it is an opportunity to grow
  - Step 2: Build Understanding: Focus on your own behaviors and how they are perceived and be reasonable- understand other have reasons for their behavior
  - Step 3: Find Common ground. Focusing on my way or your way doesn't allow for our way
  - Step 4: Practice- Conflict resolution take commitment to working on things, ongoing.

### **Review of Board Challenges and Priorities**

After getting into the frame of mind to address conflict, the group reviewed the key challenges and priorities the facilitator identified based upon conversations with the board and superintendent. The facilitator gave the group an opportunity to question or modify these and then obtained confirmation from each participant that these were the items of focus. Below are the key challenges and priorities for the board in terms of their own board operations.

- Challenges
  - Distrust (board, supt., staff, community)
  - Lots of change in a short amount of time
  - Over-stepping of roles and responsibilities
  - Public persona/perception of district leadership
- Priorities
  - Understand each other's roles, trust in the superintendent, don't overstep.
  - Get on the same page with goals
  - Establish processes, especially for communication
  - Improve the public image of the board

### **Strengthening Your Foundation**

Through a review of NSBA's Key Work of School Boards, the group reviewed responsibilities and discussed scenarios to better understand their role as board members and identify areas of opportunity within each key area that might help them achieve the above mention board priorities. Participants were asked to put areas where they saw opportunity for improvement on post-its that would be used later to narrow in on strategies to meet board priorities.

Facilitator: Nikkie Whaley, ASBA

## Recap of Sedona-Oak Creek Board Retreat 6/12/18

- Key works include: Vision, Accountability, Policy, Community Leadership, and Relationships. See attached The Key Work of School Boards Executive Summary from NSBA for definitions.

### Set Goals and Plan

The team identified the following goals

- **Review and Create a new vision/ mission statement**
  - Speaks to the priority of getting on the same page as a board
  - Establish shared focus
- **Review communications plan and work to implement it**
  - Speaks to increasing trust and reducing over-stepping if board know what information they will give/ get from Superintendent, how/when to communicate internally externally and how to manage interactions with community.
- **Establish board norms around the decision-making process**
  - Speaks to building trust amongst the board and with the community through increased transparency and consistency.

The facilitator reviews several tools to help the board create a vision/ mission, establish SMART goals and map an action plan that identifies who is responsible for what and by when. (See attached tools). As a group, we walked through the process and established one board goal.

**Goal Statement:** Establish clear criteria the board will use in its decision making (e.g. budget, students/community impacted etc.) that will be communicated out to district staff and community by August 30<sup>th</sup>2018.

**Ownership:** Board and Superintendent

**How this goal correlates to our vision:** Speaks to boards desire to increase transparency and trust

**Success Descriptors:** A survey that will go out to stakeholders (defined by board) that asks:

1. I know what criteria the board uses when making decision during board meeting?
2. I feel the board demonstrates.....(Collaboration? Consistency?) when making decisions?

**Progress Steps and Milestone with Timelines:**

- Superintendent will research best practices for making decisions by July 12, 2018
- Each board member will email at least 1 decision making criteria they think is needed to the Supt. by July 1, 2018
- Supt. will meet with district leadership team potential criteria at July 12<sup>th</sup> 2018 meeting
- Supt. will send a summary of suggested criteria to board to review by July 20, 2018
- Board will discuss criteria and outline a tool to be used at July retreat
- Supt. will finalize criteria and document to be presented and ratified at the Aug/ Sept. Board meeting.

Facilitator: Nikkie Whaley, ASBA

## Recap of Sedona-Oak Creek Board Retreat 6/12/18

- Supt. Will see that a benchmark survey is sent to determine growth over the year in success descriptors within 1 month of criteria being ratified.

### **Next Steps**

- The board and superintendent will complete the goal and action planning documents for the other two board goals. These goals and these tools will help the board as they later aim to establish district goals.
- The board will continue to work on conflict resolutions, focusing on self, working to understand each other and looking for win-win solutions that benefit the district.
- Reach out to ASBA if additional facilitation is needed