



*Fred Van Vleck, Ed.D. Chief Financial Officer, Lead Advisor  
1234 Abbey Rd. Bayside, CA 95524 – 707-599-0032*

March 28, 2024

Clatskanie School District  
Dr. Danielle Hudson, Superintendent  
660 SW Bryant St.  
Clatskanie, OR 97016

Dear Dr. Hudson,

I want to extend my appreciation for the opportunity of presenting a proposal from the National Center for Executive Leadership and School Board Development (National Center) to provide a full-day Board Governance/Team Building Workshop. The workshop will be provided by Misty Wharton, Advisor for the National Center. The primary benefit of this workshop is that it will be a foundational step toward developing and ensuring a long-term culture of quality leadership and governance. The process will include reviewing and/or updating your present governance protocols.

The workshop process stimulates active discussion between Board members and provides a product that will help guide the working relationships between Board members and the Superintendent. We assert that the culture of a school board reflects the positive or negative atmosphere created by the way people within the organization treat each other. Teams have unwritten (implicit) or written (explicit) agreements about how they will interact with one another. Effective school boards discuss and agree on the formal structures and processes used by the board and Superintendent, in their functioning as a team. This two-part workshop focuses on how the board will operate and how members agree they will do business to govern effectively.

The initial activity will be focused on presenting leadership style research that will enable Board members to become more effective in working with one another and with the staff members they lead. The workshop provides leaders with an understanding and appreciation for the unique leadership characteristics of each team member they work with and how to synergistically create an effective and productive team. The workshop is designed for each leader to develop a deeper understanding of their leadership tendencies and the unique differences in how their fellow team members lead and react. Each participant will gain a much clearer understanding of themselves and reasons to celebrate the unique differences of each member of the leadership team.

The second activity, which will take the majority of time, will be the Board Protocol Workshop.



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It is an interactive process that enables the school board to “proactively” create governance protocols. The workshop includes video vignettes to stimulate discussion, a highly participatory environment that assists in developing mutual understanding and support between board members, and, most importantly, produces a draft “governance handbook” that formalizes the protocols that will ensure that the school district’s leadership culture is highly functional and respected by those working with and for the Board. *The draft Governance Handbook produced will also include, where appropriate, much of the material that is in the existing Governance Handbook.* The following topics will, minimally, be addressed within the workshop:

- Why protocols are important
- Decision-Making Roles of the Board and Superintendent
- Board Member Authority
- Role of an Individual Board Member
- Addressing Community Concerns/Complaints
- Role of the Board in Networking
- Visiting/Assessing School Staff and Programs
- Board Member Interactions with Staff
- Scheduling of Board Meetings
- Designing and Developing the Board Agenda
- Administration of Oath of Office
- Policy Development and Roles
- Fiscal Decision-making: Role of the Board
- Requesting Information
- Public Board Meetings and Public Meeting Law Implications
- Top Ten Public Meeting Law Mistakes
- Use of Technology and Social Media
- Closed Session Confidentiality
- Conducting the Board Meeting
- Trustee Voting Responsibilities
- Conflict of Interest and Voting Implications
- Public Participation at Board Meetings
- Election of Officers of the Board
- Board and Superintendent Relationship
- Organization of Staff/Hiring and Firing of Staff
- Spokesperson for the School district
- Board and Superintendent Conflicts
- Board Direction: Road Map
- Superintendent Evaluation
- New Board Member Training Expectations
- Review and Implementation of Protocols



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### **Potential Future Areas of Focus**

As a result of the discussions held and decisions made, the following topics may be of future consideration:

- Defining foundations for fiscal integrity
- Board training and development
- Superintendent's Annual Objectives
- Facilitation of the Superintendent's Evaluation
- Strategic Plan/Goal Setting
- Role of the Board in Supporting Leadership and Succession Development
- Organizational Review/Redesign

### **Time and Financial Consideration**

The fee associated with the full-day workshop will include the cost of travel, preparation, presentation of the workshop, and providing leadership style (DiSC) individual surveys for each participant. The presentation fee is \$5,350, and the fee for the leadership style reports is \$1,398 (\$181 for each participant survey/report and \$312 for the Team Reports). A description of these reports is noted in an attached document. The total cost for the workshop will be \$6,748.

### **Preparation**

Regarding the logistics related to the workshops, we ask the following:

- Any necessary financial documents are sent to the National Center to complete, in advance of the workshop.
- An LCD projector/Large Monitor will be available and be able to connect to the consultant's laptop;
- A sound/speaker connection to the consultant's laptop be available.
- The room set-up is such that the participants can see one another and have clear visibility to the screen and presenter.
- Meal logistics are addressed by the school district.
- The Board meeting is properly posted as a Study Session.

If you have questions or need further information, please feel free to call me at 707-599-0032. I thank you for your consideration.

Sincerely,

Fred Van Vleck, Ed.D



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Lead Consultant

## **DiSC Reports Overview and Charges**

***DiSC provides individuals and teams with detailed, personalized information to help them apply DiSC learning in a variety of business applications and offers a wide range of practical interpretive reports that help people improve their effectiveness in management and customer service.***

### ***PERSONAL PROFILE***

*People can significantly enhance personal effectiveness by honestly evaluating their behavior and selecting self-management strategies. The Personal Profile can be used to train and coach respondents in specific application areas and to focus respondents' attention on particular areas of behavior.*

#### ***Everything DiSC Management Profile = \$181.00***

The Management Profile will address those areas that help shape your management experience including those priorities that motivate you and those that drain your energy as a manager. In addition, you will learn strategies to help develop the strengths of your organization and employees.

#### ***Everything DiSC Workplace Profile = \$181.00***

The Workplace Profile uses your individual assessment data to provide a wealth of information about your workplace priorities and preferences. In addition, you will learn how to connect better with colleagues whose priorities and preferences differ from yours and ways to increase your effectiveness in the workplace.

### ***TEAM REPORTS***

#### ***Team View = \$106.00***

Today, as organizations rely more on teams to innovate, problem-solve, produce, and compete at the speed of change, understanding and capitalizing on individual approaches to group processes is key to creating high-performance teams.

The Team View creates a personalized overview of your organizational team.

#### ***Group Culture Report = \$206.00***

Just as individuals have unique styles; groups also tend to develop their own unique styles or cultures. This culture is an informal combination of behaviors, values, and attitudes that most people in the group take for granted. Put in the simplest terms, culture is "the way we do things."

Although not everybody agrees with or flows with the culture, most group members feel the pressure that a culture exerts to act in a certain way. DiSC does not address all



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elements of culture, but it helps you understand many important needs, goals, fears, emotions, and behaviors within your culture.

### ***Why is Group Culture Important?***

Group culture has a large impact on the behavior, attitudes, and satisfaction of each group member. People who fit into the culture often feel right at home in the group. But for other people, the culture leads them to feel like strangers in a strange land. The environment makes them uncomfortable.

Culture also has implications for the group as a whole. It affects such things as the pace at which work gets done, how outsiders are treated, the attention paid to details, or the risks that the group takes. These in turn influence the success of the group in meeting its goals.

### ***Where Does Group Culture Come From?***

Group culture is not simply the average of all the people in the group. Many different factors determine group culture, such as:

- The style of the group leaders
- The most pronounced styles within the group
- The type of work the group does
- The historical culture of the group
- The cohesion or tension within the group
- The goals and mission that the group faces

These are just some of the factors that help shape group culture. Understanding the origins of your culture may be important if you hope to change it or capitalize on its strengths.