



Pacific Grove Unified School District Governance Handbook 2025-2026

The Board of Education is entrusted by the community to uphold the Constitutions of California and the United States, to protect the public interest in schools, and to ensure that a high-quality education is provided to each student.

Board of Trustees

Dr. Elliott Hazen, President

Jennifer McNary, Trustee, Clerk

Laura Ottmar, Trustee

Mike Wachs, Trustee

Beth Shammas, Trustee

Superintendent

Dr. Linda Adamson

Unity of Purpose, Roles and Responsibilities, Norms, and Agreements

This handbook reflects the governance team's work on creation of a framework for effective governance. This involves ongoing discussions about unity of purpose, roles, norms and coming to agreement on protocols for formal structures that enable the governance team to continue to perform its responsibilities in a way that best benefits all children.

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Building a Governance Team

Unity of Purpose

School district governance is the act of transforming the needs, wishes, and desires of the community into policies that direct the community's schools.

In a school district, the Board and Superintendent work together as a governance team. For a governance team to work together effectively, members need to: Maintain a unity of purpose; agree on and govern within appropriate roles; create and sustain a positive governance culture and create a supportive structure for effective governance.

PGUSD CORE VALUES

What We Stand For And Represent

At Pacific Grove Unified School District, we pledge that all students who come through our doors will do so with the right and the full expectation of experiencing three core values:



BELONGING

We will strive to create a “Culture of We” at every school site where ALL individuals feel welcomed, heard, respected, and included and where their culture, backgrounds, and beliefs are celebrated and valued.



SAFETY

We will strive to create a “Culture of We” in which ALL individuals are assured respect and dignity and each person is uniformly protected from mental, physical, and emotional harm.



PROSPERITY

We will strive to create a “Culture of We” in which ALL students feel assured of an environment and culture dedicated to the greatest measure of preparedness for their highest degree of academic, professional, and personal achievement.

Governance Roles and Responsibilities

The Board of Trustees, as the governing body of Pacific Grove Unified School District, is elected to ensure that the district reflects and responds to the values, beliefs, and priorities of the local community. The Board governs collectively, not as individuals, and works in partnership with the Superintendent to maintain a high-functioning public school system focused on student success.

The President of the Board of Trustees, as elected, carries no additional rights to any other board member, but acts as the voice of the board when necessary. This includes running meetings as parliamentarian, aiding district communications when needed, acting as spokesperson at district ceremonies and events on behalf of the board, and calling meetings in accordance with law.

The Clerk of the Board of Trustees, as elected, holds responsibilities that support the effective operation of the Board and ensure compliance with legal and procedural requirements. The Clerk may be called upon to certify or attest to official Board actions, sign documents on behalf of the district as authorized, and maintain records as required by law. The Clerk also serves as the presiding officer in the absence of the Board President, attends agenda planning meetings as necessary, and fulfills any additional duties assigned by the Board.

The Superintendent, as the district's chief executive officer, assists the Board in all areas and is responsible for implementing Board policy and managing day-to-day operations. Together, the Board and Superintendent form a governance team focused on ensuring every student in PGUSD thrives.

In alignment with Board Bylaw 9000, Trustees fulfill the following five core responsibilities:

1. Set Direction

The Board sets the long-term vision and strategic direction for the district. This includes:

- Focusing all efforts on improved student learning and achievement.
- Engaging stakeholders—students, staff, families, and community members—through established processes led by staff (such as the annual stakeholder engagement forums) to identify and prioritize district needs that inform the strategic planning/LCAP process.
- Developing and updating foundational guiding documents, including beliefs, vision, goals, and success indicators.
- Ensuring these guiding principles drive all district work and decision-making.

2. Establish an Effective and Efficient Structure

The Board establishes and maintains systems that support student learning and district operations, including:

- The primary responsibility of acting in the best interests of every student in the district.
- Selecting, supporting, and evaluating the Superintendent.

- Setting and adopting policy as well as becoming familiar with existing policy.
- Adopting curriculum and instructional materials based on recommendations from district staff.
- Establishing budget priorities and approving the annual budget.
- Overseeing facilities planning and maintenance. *Change to: Providing strategic direction for facilities planning and maintenance initiatives*
- Voting on and approving collective bargaining agreements.
- Providing direction for policy involving human resources and staffing.
- Providing direction on district vision, district growth areas, and long term planning

3. Provide Support

Trustees support the district's work through action and behavior by:

- Modeling professional, respectful, and student-centered leadership.
- Ensuring resources are aligned with district goals and priorities.
- Maintaining positive professional relationships with all employees and valuing their contributions.
- Listening actively to stakeholders and being well-informed about district initiatives and efforts.
- Upholding Board-adopted policies and decisions.

4. Ensure Accountability

The Board is accountable to the public and regularly evaluates district performance by:

- Monitoring student achievement and program effectiveness.
- Requiring program changes where needed to meet student needs.
- Evaluating the Superintendent.
- Reviewing and revising policies and practices on a regular basis.
- Monitoring and directing staff to adjusting the district budget and financial condition.
- Serving as a judicial and appeals body, as needed and as appropriate.

5. Act as Community Leaders

Trustees serve as ambassadors for PGUSD and public education by:

- Setting the tone for the district
- Communicating clearly and consistently about district priorities and decisions.
- Engaging the community in district initiatives, celebrations, and challenges.
- Advocating as a unified Board on behalf of students, schools, and public education at the local, state, and national levels; the Board President leads and coordinates these advocacy efforts to build broader support within the community and beyond.
- Promoting transparency and trust between the district and its community.
- Speaking with a unified voice once the Board has made a decision.

Creating and Sustaining a Positive Team Culture

Culture is the positive or negative atmosphere created by the way people in an organization treat each other. Teams have unwritten and written agreements about how they will behave with each other and others. These behavioral ground rules, often called norms, enable teams to build and maintain a positive culture or shift a negative one.

Our Norms

1. Accountability

We take collective responsibility for the performance and success of our governance team.

Each trustee contributes to maintaining trust, transparency, and the integrity of board operations while staying focused on what's best for students.

2. Competence and Judiciousness

We commit to acting as informed, thoughtful, and ethical stewards of public education. We honor our roles, avoid micromanagement, and collaborate constructively. Through professional development, preparation, and respectful conduct, we model effective leadership and focus on the district's long-term vision.

3. Ethics and Integrity

We uphold the highest standards of ethical conduct, fairness, and transparency. We adhere to the Brown Act and only discuss issues in adherence with the Brown Act. We do not engage in serial or multi-board member conversations outside of board meetings. We avoid conflicts of interest, honor confidentiality, and do not use our positions for personal gain. Trust is maintained through honesty, discretion, and a shared commitment to integrity in all interactions.

4. Solidarity

We value our collective impact over individual interests and personal opinions. Personal disagreements are addressed privately and respectfully. We maintain a united front, engage in thoughtful deliberation, and avoid personal attacks, ensuring our decisions are grounded in student-centered governance.

5. How the Board communicates

We prioritize open, honest, and respectful communication. Differences of opinion are welcomed and discussed civilly. Once decisions are made, we speak with one voice to foster public trust and avoid undermining the work or reputation of the board or superintendent.

6. Support, Respect, and Consideration

We treat one another as equal partners in leadership, showing courtesy, empathy, and appreciation for each other's contributions. We avoid gossip or personal complaints, support the superintendent's role, and respect each other's time, motivations, and perspectives.

Governance Team Protocols

1. "No" Votes or Abstentions

Board members may briefly explain a "no" vote or abstention as a courtesy, promoting transparency and clarity in decision-making. Note - abstentions should be made only in times of conflict of interest.

2. Agree to Disagree

Differences in opinion are respected; once a majority decision is made, all members agree to support or refrain from undermining it, modeling respectful dialogue and unity. We agree to express disagreement in ways that are constructive and respectful, avoiding language that places blame or makes others feel they are wrong—recognizing that *how* we disagree is just as important as *what* we disagree about.

3. Agenda Development

Agenda items may be requested by any stakeholder and are collaboratively developed by the Superintendent and Board leadership, ensuring transparency and responsiveness.

4. Criteria for Evaluating Programs

Programs are evaluated using objective, student-centered criteria that emphasize educational impact and fiscal responsibility.

5. Chain of Command

The Board honors the chain of command by directing stakeholders to appropriate personnel and recognizing the Superintendent as its sole employee.

6. Complaint and Inquiry Reporting

Board members share all public complaints or inquiries with the Superintendent to ensure cohesive communication and resolution within the governance team.

7. Confidentiality

Closed session discussions are strictly confidential, and all Board members are expected to uphold this responsibility under the Brown Act.

8. Site/Program Visitations

Board members may visit school sites as board members with proper notice to the Superintendent and in accordance with campus protocols, without disrupting instruction or performing evaluations.

9. Personal Problem Solving

Team members address interpersonal concerns directly and constructively, avoiding gossip or unverified assumptions that damage relationships. We agree to communicate early and respectfully when concerns arise, rather than waiting until frustration builds. When we feel angry or upset, we will engage in open, solution-oriented dialogue to preserve trust and teamwork.

10. Personal or Preferential Treatment

Board members do not seek special treatment for themselves or others, and model fairness, equity, and integrity in all interactions.

11. Orientation of New Members

Newly elected or appointed trustees participate in a comprehensive orientation covering governance protocols, legal responsibilities, and key district information within the timeframes guided by BP 9230.

12. Handling Concerns and Complaints from the Public and Staff

Concerns from the community are acknowledged and redirected through proper channels, while maintaining fairness, confidentiality, and Board roles.

13. Self-Monitoring of Governance Team Effectiveness

The Board annually evaluates its governance practices to ensure continuous improvement and alignment with shared values and responsibilities.

14. Superintendent Evaluation

The Board commits to a thorough and contractually consistent annual evaluation of the Superintendent to maintain accountability and growth.

15. Individual Board Member Requests for Information

Information requested or information obtained by one Board member is shared with the superintendent who will share it with the full Board, and staff time is respected by distinguishing between “need to know” and “nice to know” inquiries.

16. Individual Board Member Requests for Action

Only the full Board, acting by majority in a public meeting, may direct staff action; individual members may propose ideas for consideration by the Board.

17. Board Meeting Management

Board meetings are formal governance sessions held in public, not open forums, and are managed with consistency and fairness to ensure community voices are heard appropriately.

18. Managing Difficult Topics

The Board engages in difficult discussions with mutual respect, limiting debate to trustees and ensuring decorum during public comment.

19. Board Notification

The Superintendent keeps the Board informed of significant or potentially public matters via regular communication, especially during emergencies.

20. Closed Session Planning Protocols

The Board will extend a regular closed session or schedule a separate, standalone closed session meeting when items require additional time for thoughtful discussion. Examples include complex matters such as negotiations, the superintendent's evaluation, or other sensitive topics that warrant extended deliberation beyond the time typically available during a regular meeting.

PGUSD 9000 Series – Board Bylaws

PGUSD 9000 Series – Board Bylaws

- [9000](#) Role of the Board
- [9005](#) Governance Standards
- [9010](#) Public Statements
- [9011](#) Disclosure of Confidential/Privileged Information
- [9012](#) Board Member electronic Communications
- [9100](#) Organization
- [9110](#) Terms of Office
- [9121](#) President
- [9122](#) Secretary
- [9123](#) Clerk
- [9124](#) Attorney
- [9130](#) Board Committees
- [9140](#) Board Representatives
- [9150](#) Student Board Members
- [9200](#) Limits of Board Member Authority
- [9220](#) Governing Board Elections
- [9220E-\(1\)](#) Governing Board Elections
- [9222](#) Resignation
- [9223](#) Filling Vacancies
- [9224](#) Oath or Affirmation
- [9230](#) Orientation

- [9240](#) Board Training
- [9250](#) Remuneration, Reimbursement and Other Benefits
- [9250-E\(1\)](#) Remuneration, Reimbursement and Other Benefits
- [9260](#) Legal Protection
- [9270](#) Conflict of Interest
- [9270-E\(1\)](#) Conflict of Interest
- [9310](#) Board Policies
- [9320](#) Meetings and Notices
- [9321](#) Closed Session
- [9321-E\(1\)](#) Closed Session
- [9321-E\(2\)](#) Closed Session
- [9322](#) Agenda/Meeting Materials
- [9322-E\(1\)](#) Agenda/Meeting Materials
- [9323](#) Meeting Conduct
- [9323.1](#) Order of Business
- [9323.2](#) Actions by the Board
- [9323.2-E\(1\)](#) Actions by the Board
- [9323.2-E\(2\)](#) Actions by the Board
- [9324](#) Minutes and Recordings
- [9400](#) Board Self-Evaluation

Helpful Resources for Trustees

A curated list of websites and tools to support informed and effective board service.

1. Governance & Policy

- California School Boards Association (CSBA)
www.csba.org
Trainings, policy services (GAMUT), governance resources, legal updates, and events like the Annual Education Conference (AEC)
 - GAMUT Policy Platform (via CSBA)
<https://www.csba.org/GAMUT>
PGUSD [Board Policies](#)
 - CSBA Trainings and Events [Website](#)
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2. Legal & Compliance

- California Department of Education (CDE)
www.cde.ca.gov
State education policy, funding, assessment, accountability, and

compliance resources

- **Fair Political Practices Commission (FPPC)**
www.fppc.ca.gov
Guidance on ethics, Form 700 filings, and conflict of interest rules
 - **Brown Act (Open Meeting Law Overview)**
[Lozano Smith Brown Act Handbook](#)
Summary and guidelines for transparency in public meetings
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3. Fiscal Oversight

- **Ed-Data (Education Data Partnership)**
www.ed-data.org
District-level financial, demographic, and performance data
 - **California State Controller's Office – K-12 District Financials**
www.sco.ca.gov
Audits, budget reports, and local agency finances
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4. State & Legislative Updates

- **California Legislative Information**
leginfo.legislature.ca.gov
Track education-related bills, laws, and legislative calendars
 - **EdSource**
www.edsource.org
Nonpartisan education news, analysis, and research specific to California
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5. Local Resources

- **PGUSD Website**
www.pgusd.org
Access to board agendas, meeting materials, district goals, and contact

information

- **Monterey County Office of Education (MCOE)**

www.montereycoe.org

Local governance support, professional development, and regional coordination

6. Training & Networking

- **Masters in Governance (CSBA)**

[Masters in Governance](#)

Structured professional development program for school board members

- **California School Boards Association Annual Education Conference**

[\(AEC\)https://aec.csba.org/](https://aec.csba.org/)

Networking, breakout sessions, legal updates, and policy training

Tip for Trustees

Bookmark these resources and refer to them frequently. Staying informed helps ensure that all trustees can contribute effectively, responsibly, and collaboratively in service to PGUSD students and the community.

Affirmation

We have reviewed and agree to abide by and institutionalize the aforementioned governance team standards and protocols in order to support a positive and productive working relationship among the Pacific Grove Unified School District Board of Education, Superintendent, Staff, Students and the Community. We shall renew this agreement at each Annual Organizational Meeting of the Board of Education.

Affirmed on this date: June 26, 2025

Dr. Elliott Hazen, Board President

Ms. Jennifer McNary, Clerk

Ms. Laura Ottmar

Ms. Beth Shammass

Mr. Mike Wachs

Dr. Linda Adamson, Superintendent