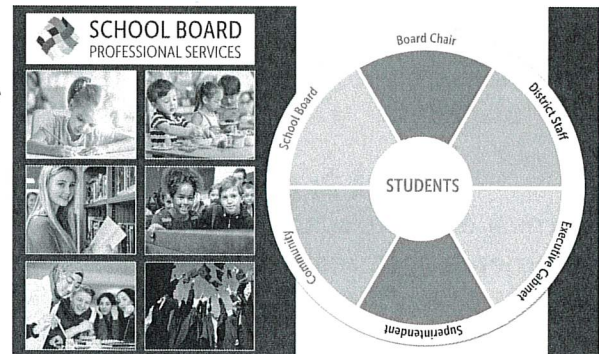


PROJECT DESCRIPTION & OBJECTIVES

Effective school boards are grounded in trust, shared purpose, and respectful communication between the board, superintendent, and district staff. In this district, long-standing habits of back-channel communication, end-runs around administrative leadership, and unclear boundaries between governance and management have created tension and confusion.



This facilitated session, led by PartnerED Consultants, will provide an intentional space for the board to clarify its purpose, strengthen its team culture, and develop protocols that ensure communication and decision-making occur through proper channels. By doing so, the board will elevate its collective effectiveness, strengthen trust with the superintendent and the community, and operate with one clear voice in service of the district's mission and students.

Part 1:

Board Retreat: Rebuilding Trust and Strengthening Governance: A Collaborative Workshop for the School Board

Duration: 3 hours Format: In-person facilitated session

PartnerED Facilitators:

Judy Keliher, Former School Board Member

Julie Critz, Retired Superintendent

This session will blend facilitated conversation, guided reflection, and collaborative development of written agreements to ensure shared understanding and commitment to effective governance practices.

OBJECTIVES

By the end of this session, participants will:

1. Revisit and affirm the fundamental purpose and responsibilities of a school board.
2. Clarify distinctions between governance and management roles to prevent role confusion and end-runs.
3. Develop a shared collective agreement outlining expected behaviors, communication norms, and decision-making processes.
4. Collaboratively establish communication protocols that strengthen board, superintendent, and community trust.
5. Commit to sustained alignment and accountability through personal reflection and written commitments to the agreements established.

EXPECTED OUTCOMES

Following this session, the board will have:

1. A clear and shared *statement of purpose* defining the role of the board in relation to the superintendent and district staff.
2. A *collective agreement* capturing how members will operate, communicate, and hold one another accountable.
3. Documented *communication protocols* that prevent end-runs, reinforce transparency, and uphold respect for organizational structure.
4. A renewed *sense of team identity* centered on collaboration, trust, and student-focused decision-making.
5. Next-step recommendations for formal board adoption and ongoing review of governance practices.

Part 2: ONGOING GOVERNANCE COACHING AND REFLECTION

The most effective school boards continually reflect on how their actions align with their collective agreements, communication protocols, and shared purpose. Sustained improvement in governance requires ongoing feedback, reflection, and support—especially for the board chairperson, who plays a pivotal role in modeling and reinforcing effective board behaviors.

Through monthly one-on-one virtual coaching sessions, the PartnerED facilitator will partner with the school board chairperson to strengthen board leadership, monitor adherence to governance agreements, and build the chair's capacity to address issues proactively and constructively. This ongoing coaching ensures that the commitments made in Part 1 are sustained, modeled, and embedded into the culture of board operations.

COACHING PROCESS

- Monthly Virtual Coaching Sessions – 30-minute confidential sessions focused on leadership growth, communication strategies, and adherence to agreements.
- Observation and Analysis of Board Meetings – Facilitator reviews recorded meetings and identifies communication patterns and adherence to governance roles.
- Reflective Dialogue and Support – Debrief sessions to identify successes, challenges, and actionable strategies for improvement.
- Progress Monitoring and Reporting – Periodic summaries outlining progress themes and recommended next steps for sustained improvement.

OBJECTIVES

1. Strengthen the board chair's leadership skills and confidence in guiding the board.
2. Develop strategies for addressing behaviors that undermine trust and alignment.
3. Gain an external perspective on board meeting dynamics and team effectiveness.
4. Sustain commitments made in Part 1 by modeling accountability and consistency.
5. Promote a culture of reflection and continuous improvement.

APPENDIX

The two experienced PartnerED Consultants that will be working on this project are listed below, along with a brief biography of their education related work.

Judy Keliher was elected seven times to the Lakeville Area Board of Education serving over 12,000 students and 2,000 staff. She has served in key roles including Board Chair for 9 years, Vice Chair, Clerk, and Treasurer. Her contributions include leading superintendent selection and performance reviews, spearheading budget and policy committees, and guiding the community through complex initiatives such as grade reconfiguration, boundary changes, and the launch of innovative programs like a public Montessori-model and a state-certified online K-12 academy. Judy also served as a Minnesota School Board Association delegate to the State Legislature, advocating for education policy and governance excellence. She is deeply committed to inclusive leadership, stakeholder engagement, and improving student outcomes through responsive, informed decision-making.

With a career spanning enterprise sales management, education leadership, and family business operations, Judy brings a rare blend of business acumen, people development, and community engagement to every role she takes on and she is known for clear communication, prioritization expertise, and driving successful, goal-focused outcomes. Her flexible leadership style allows her to adapt quickly, identifying and executing the right strategies for optimal results.

Julie Critz served as Superintendent of Alexandria Public Schools for five years, leading the district through transformative change and multiple high-impact initiatives. Under her leadership, the district passed two successful building bond referendums and a pivotal operating levy in 2020. She played a central role in the launch of the **Academies of Alexandria**, a nationally recognized small learning community model that reimagines high school through a career pathway lens.

Prior to her superintendency, Julie served eight years as Assistant Superintendent of Teaching & Learning, where she spearheaded districtwide program audits, curriculum alignment, and instructional redesigns across the K-12 continuum. Her strategic oversight included the development, evaluation, and refinement of academic programs at the elementary, middle, and high school levels, always with an eye toward coherence, student engagement, and postsecondary readiness.

Since retiring in 2020, Julie has continued to shape the future of education as a sought-after **consultant, executive coach and strategic planning facilitator**. She has provided interim superintendent leadership to a smaller school district and contributed her expertise to numerous school systems.

EXPECTED OUTCOMES

1. A board chairperson equipped with enhanced facilitation and leadership skills.
2. Observable improvements in how the board operates and communicates.
3. A sustainable governance framework reinforced through modeling and reflection.
4. Improved superintendent–board relations and reduced end-runs or role confusion.

PROJECT TIMELINE:

- One 3 hour session- Date to be determined in collaboration with Supt. Ludvigson
- Monthly Virtual meetings between PE School Board Facilitator and LPGE School Board Chairperson

PROJECT COST:

- Part 1: School Board Retreat - \$1200
 - Preparation for session
 - Facilitation of session by 2 experienced facilitators
 - Pre-session planning with Superintendent Ludvigson & Board Chairperson Linda Gohman
 - Post-session follow-up with Superintendent Ludvigson & Board Chairperson Linda Gohman
 - Written summary following session
- Part 2: Ongoing Governance Coaching & Reflection - \$250 per month
 - 30 minute virtual conversation between PE School Board Facilitator and School Board Chairperson
 - Planning for the virtual session which includes watching school board meeting recordings, analyzing meetings according to prior agreements and preparing feedback for the Board Chairperson.
- Additional sessions available upon request for additional cost

ADDITIONAL COSTS:

- Facilitator mileage
- Duplication of materials (provided by the school district)

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