

---

# A Checklist for New Board Member Orientation

---

**Orientation to the Board:** These items are generally the school board's areas of expertise and, therefore, should be the board's responsibility in the orientation process. Often, the board president will take the lead for this part of the orientation process with the assistance of the superintendent and other members of the board.

New board members should have access to the following items:

- Policy manual with an explanation of its use
- A copy of current district goals
- An explanation of school board organization (bylaws, officers, standing and ad hoc committees, if any.)
- An explanation of any policies governing board member conduct and activities (i.e., board code of conduct, travel expenses, conflict of interest, professional development, calendar of important events)
- An explanation of how board meetings are conducted, including rules of order used, Open Meetings Act requirements, placing items on the agenda, superintendent's informational packets
- Information about the board speaking with one voice, the authority of the board vs. the authority of any individual board member, the chain of command, etc.
- An explanation of board processes: gathering community input, monitoring district progress, self-evaluation, communication with the media
- A historical perspective of the board's current work, including minutes from the past year's board meetings
- An explanation of the board packet
- A list of board development opportunities throughout the year

**Orientation to Board/Superintendent Roles and Relationship:** These items are generally shared areas of expertise between the board and superintendent, and, therefore, should be a joint responsibility in the orientation process.

New board members should have access to the following items:

- An explanation of the authority and responsibilities of the board, superintendent, administrators and individual board members
- An explanation of how communication occurs between the board and the superintendent
- Explanation of how authority is delegated to the superintendent
- A copy of the superintendent's job description and contract
- An organization chart of the school district's management structure
- A copy of the superintendent's evaluation tool
- An explanation of how communication flows between board members and superintendent and how to use the chain of command

**Orientation to the District:** These items are generally the superintendent's areas of expertise and responsibility in the orientation process.

New board members should have access to the following items:

### School Finance

- A copy of the district's budget and an explanation of how, when and by whom it is prepared
- An explanation of the state's financial plan and what it means in terms of local district budget
- Data on district per pupil cost and expenditures
- An explanation of the funding process for the school district
- A description of the district's student enrollment trends and projections
- Data on the existing bond indebtedness of the district
- Information on federal aid to district's education program

### Facilities

- A list showing the number, location and conditions of schools and other buildings
- An explanation of construction projects contemplated and in process
- An explanation of the student transportation system
- A description of the geographic boundaries and attendance zones of the school district

### School Curriculum and Instruction

- An explanation of curriculum standards required by state law
- Copies of recent state report cards
- A description of the district's overall curriculum
- An explanation of school improvement initiatives
- Student dropout statistics
- Information on recent test results and the utilization of test results
- Data on the percentages of students who go onto college or other post high school programs
- Documents showing teacher-pupil ratio and median class size for the district and for appropriate sub-groupings
- An explanation of the district's program for exceptional children
- Data on the age and condition of textbooks, technology and school equipment
- The district's technology plan
- A list of extra-and co-curricular activities in the district

### Administration and Staff

- An explanation of personnel recruitment and hiring procedures
- A copy of staff salary schedules and fringe benefit programs
- A copy of the district's collective bargaining agreements
- An explanation of the district's evaluation criteria and procedures for administrators and teachers
- An explanation of the district's professional development program

## Questions New Board Members Might Ask

- Who prepares the agendas for board meetings and how do I get an item included?
- What do I do if I need additional information?
- What are the guidelines of the Open Meetings Act?
- How does the board respond to controversial situations?
- When is it appropriate to raise concerns about staff?
- How do I deal with questions from the media?
- How do I respond to community members when I'm on the losing side of a close and carefully watched vote?
- What relationship should board members have with central office, principals and teachers?