What Every New School Board Member Needs To Know Guide

Tips for new board members on how to use this guide:

- Schedule your orientation in multiple sessions to make it more manageable.

- Connect each item to your board service. Keep asking why this information is important for board members to know.

- Review the board's policies before using this guide. Many initial questions posed by new board members are already addressed in their board's policies.

Tips for experienced board members and district administrators on how to use this guide as a part of your board orientation process:

- Make the process your own. Adapt this framework to meet the needs of your district. Add additional questions and resources.

- Consider involving the whole board and use this exercise as a way to improve board governance.

- Ensure that your new board members know how to access your board policies and other pertinent resources.

Potential Orientation Documents:

Available from the local board policy manual or board president:

- Board mission/vision statements and district belief/vision statements.

- Board processes, including expense reimbursement, types of board meetings, board meeting procedure, agenda preparation (how to get a topic added to the meeting agenda), and policy development.

- Communication processes, including use of email, who speaks for the board, and communicating with the media.

- Code of Conduct for members of the board and conflicts of interest criteria.

- District intergovernmental agreements.

- District organizational chart.

- Standing advisory committees and members.

- District administrator evaluation and goals.

- Status of board policies currently under review.

Available from the district administrator or local district website:

- Board meeting minutes from the previous year.

- Current district budget.

- Most recent fiscal audit.

- Most recent monthly financial report to the board.

- District Strategic Plan.

- District Improvement Plans and School Improvement Plan(s).

- District Communication Plan.

- Brief summary of priority staff development initiatives.

- Contracts, including any collective bargaining agreements between the district and teachers and noncertified personnel, and district administrator's contract.

- Important calendars, including regular board meetings, budget and district calendars.

- Handbooks, including employee and student handbooks.

- Summary of legislative items currently of interest to the district and any recent communications with state and/or federal legislators.

- Summary of pending litigation involving the district.

- Special reports such as facility assessments, curriculum studies, results of recent community surveys, and enrollment trends.

- Status of current or upcoming facility projects.

- Overview of school safety plan and data on safety-related issues.

Available from the Wisconsin Department of Public Instruction website:

- District and School Report Cards.

- State Academic Standards.

- Statewide K-12 data.

- School finance data.

- In-depth background information on K-12 initiatives (e.g. accountability reform and educator effectiveness).

Available from the Wisconsin Association of School Boards

- In-depth information on advocacy, school law (including open meeting and public record laws), policies, and governance topics via WASB staff, the WASB website at WASB.org, publications, programs and trainings.

  - Some information on the WASB website - WASB.org - is member only and a log in is required. To log in for the first time, use the email address provided to the WASB by the district administrative assistant and use the "Forgot Password" link to set a new password.

  - WASB staff are available to answer basic questions as a part of member services. If a member requests extensive legal, policy or consulting services, additional fees may apply.

- Additional WASB services of particular relevance to new board members include:

  - Annual Board Development Tool Survey and School Board Meeting Self-Evaluation Tool.

  - WASB Governance Framework.

What Every New Board Member Needs To Know

– About District Operations –

1. **District Administrator:**   Phone: Cell Phone: E-mail:

   _____

2. **District Administrative Asst.:**   Phone: E-mail:

   _____

3. **Communities served by the district:**

   _____

   _____

   _____

   _____

4. **Number of students enrolled:**

   Total: _____

   3/4-Year Old K _____ Elementary school: _____

   Middle school: _____ High school: _____

   Alternative school(s): _____

5. **Student Population:**

   Ethnic Groups by Percentage:_____

   _____

   _____

   Percentage of English language learners: _____

   Primary languages spoken at home other than English: _____

   _____

   _____

   Percentage of students receiving free or reduced-price lunch: _____

   Percentage of children with disabilities: _____

6. **Number of square miles the district covers:** _____

7. **Transportation:** District operated?_____ Contracted? _____

8. **District Office Department Heads:**

Name	Title

9. **Number of employees in district:** Certificated_____ Classified_____

10. **What unions are in place?** _____President_____

    (if applicable) _____President_____

    _____President_____

11. **District social media presence:**

Social Media Platform	Site or Keyword(s) to search
Facebook	
Twitter	
Instagram	
Other	

12. District Schools

Name of School	Type of School	Grade Levels	Number of Students

13. Other school-owned properties and services

Property (i.e. school forest)/ Service (i.e. recreation department)	Purpose

What Every New Board Member Needs To Know

– About Board of Education Operations –

1. How to access board documents and policies:

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2. Order of items on the board meeting agenda:

1.	7.
2.	8.
3.	9.
4.	10.
5.	11.
6.	12.

3. Board Committees:

Committee name	Purpose

4. Advisory Committees:

Committee name	Purpose

5. Governance Protocols - How we do business:

Board meeting agenda developed and reviewed by:	
Placing items on the board meeting agenda:	
Board meeting packet delivered when:	
Obtaining additional information about board meeting agenda items before the meeting:	

Obtaining answers to questions about board meeting agenda items before the meeting:	
Alerting the board president of the desire to speak on a particular agenda item:	
Introducing new ideas for the board's consideration:	
Parliamentary procedure used during the meetings:	
Purpose and structure of the public comment section of the board meeting:	
What is the decision-making capability of the committees and how do they make recommendations to the board:	
Purpose of closed meetings and legalities of maintaining confidentiality:	

Process for updating policies:	
Board goals – when are they reviewed:	
How does the board ensure that board policies align with handbooks and staff practice:	
When and how is data presented to the board:	
How does the board evaluate programs:	
When and how does the board receive progress reports on efforts to improve instruction and student learning:	
Process and time line for budget deliberations?	

District's current financial condition:	
Anticipated budget or financial issues the board will need to address:	
Responding to staff or community complaints or concerns at board meetings:	
Communications between and among the board, board members and the superintendent:	
Communications between the board and other staff:	
Responding to community or staff complaints or concerns outside of board meetings (chain of command):	
Individual board member requests for information from staff:	

When does the board seek legal advice?	
When and how the board conducts a self-evaluation:	
When and how does the board evaluate the superintendent? What is the time line?	
How are media requests handled?	
How and when are legislators contacted?	
How, when and whom to notify about visiting school sites or participating in district activities:	
Board member participation on district committees and in district activities:	

What is the expectation for participating in community events:	
What is the board member stipend (if applicable):	
Opportunities for professional development:	
Attending conferences / educational meetings / community events:	
Making reservations for conferences / workshops / district business trips:	
Travel expenses and reimbursements:	

6. Questions to consider

What changes have occurred in the district in the past five years? What changes are anticipated in the next five years?

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Other Notes:

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