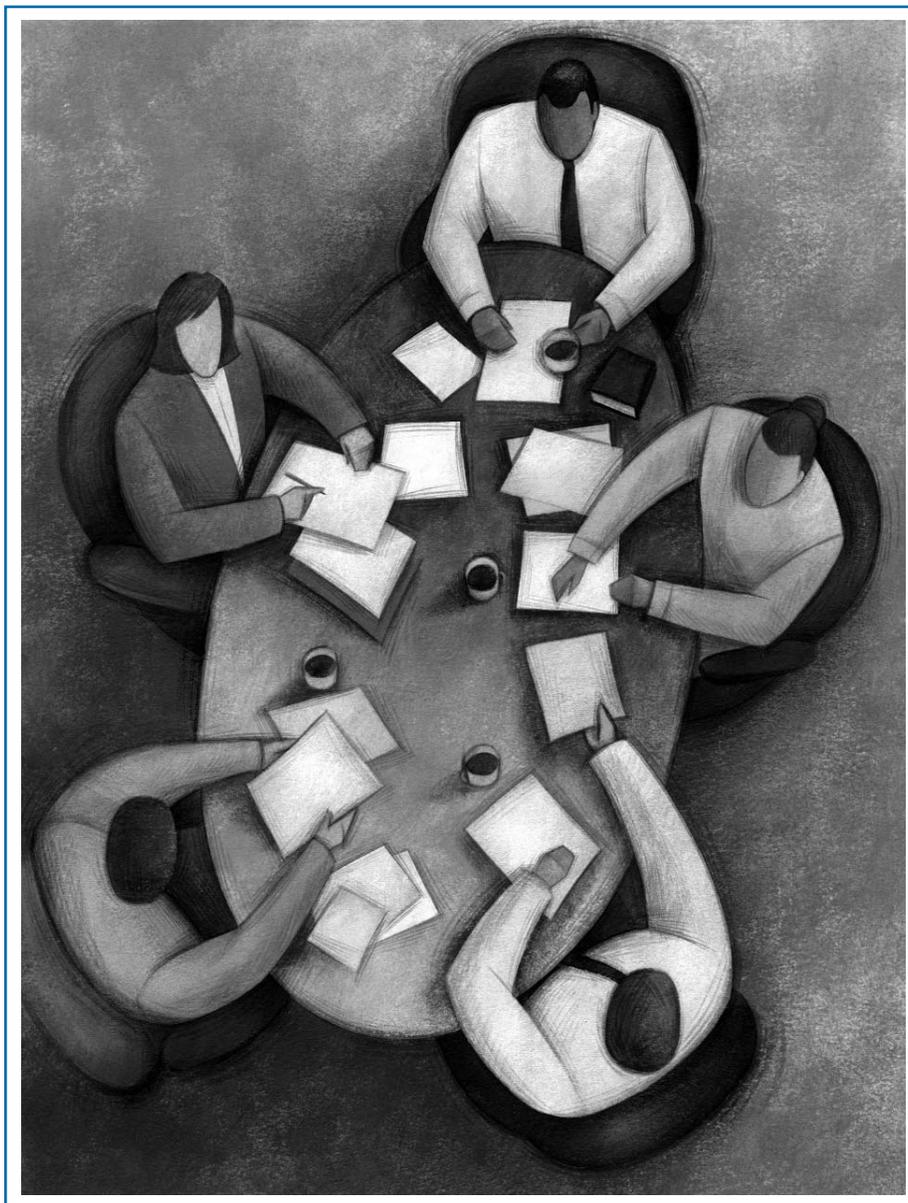


Orienting New School Board Members on the way to Becoming a High-Performing Board Team



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Orienting New School Board Members on the way to Becoming a High-Performing Board Team

OVERVIEW

In order to become a high-performing team, each board must address the orientation needs of new board members and the development of the “new” team. IASB staff has developed these materials to help school boards orient newly elected or appointed board members to their position. Three agendas with accompanying materials and questions will help you work through this orientation process.

The first orientation step, which involves district documents and materials, should be conducted by the superintendent and board president and does not necessarily have to occur at a regular meeting. The meeting will have to be posted and conducted as an open meeting.

The second set of agendas involving conversations about district identity and processes can be followed during a regularly scheduled board meeting. While some boards may wish to follow this agenda and conduct the meeting on their own, other boards may feel more comfortable with an outside facilitator. This could be with another district administrator or community leader familiar with facilitation techniques, or the board could contact the Association for assistance.

These materials were developed following Association staff discussions regarding a more organized approach to bringing new board members “up to speed” and helping boards create the feeling of “team” necessary to accomplish many of the difficult challenges that they face.

In addition, the sixth of IASB’s *Foundational Principles of Effective Governance* states “the school board takes responsibility for itself,” meaning its own procedures, practices and behaviors. Thus, an essential part of any board’s activities should be the orientation and training of newly seated board members.

THE WORK

Every other year, most school boards gain at least one new member, and some even acquire a new majority of four or more new members. Whenever new members join the governance team, whether one or more board members or a new superintendent, it is valuable to go “back to the basics.”

Organizational theory confirms that all newly formed teams go through four “building” stages: getting to know each other, surfacing differences, learning to embrace differences and finally working as a high performing team. These four steps also have been called “forming, storming, norming and performing.” An effective orientation program for new board members can accelerate the time between the start and becoming that high-performing team.

Boards have such important work to do around making certain that every child learns, being good stewards of community resources and avoiding minutia that there is little value in wasting time getting down to business. A small amount of time invested in orientation and team building will allow the board to focus on its important work. Time invested is well worth the effort in terms of reduced stress on members, community confidence and the effectiveness of your school board. Some people use the helpful phrase “go slow to go fast.”

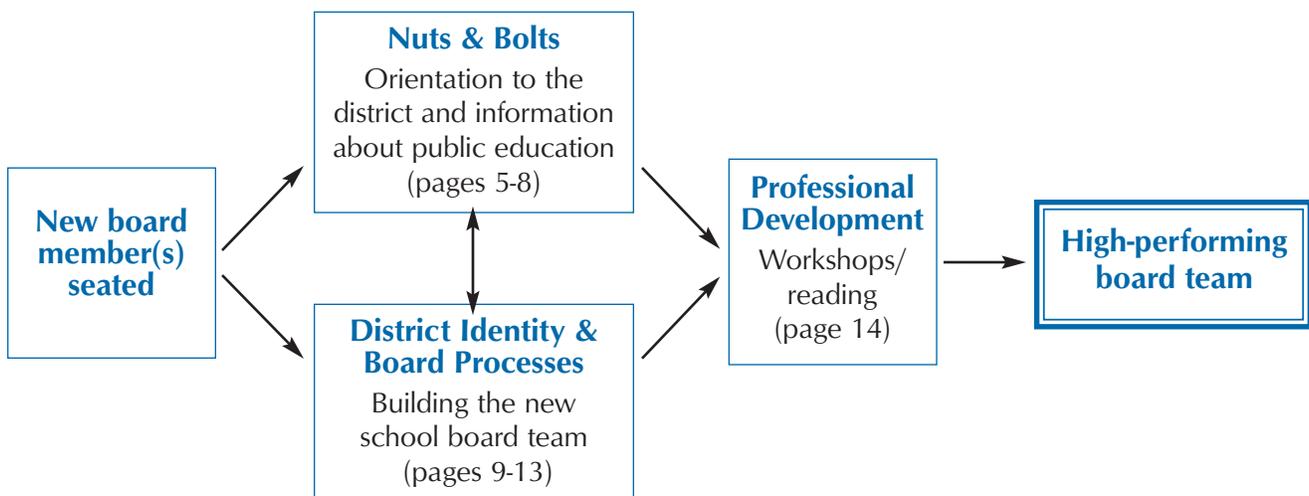
Each member of the board has the potential to make an important contribution. Every new board also has the potential to create a high performing team. To get to that destination of a high-performing board, the new board team has three areas that need to be addressed: providing new board members with the information they will need to do their job effectively, building the new team and pursuing professional development opportunities.

The three distinct tasks that have been identified are:

1. Nuts & Bolts — Orientation to the district and information about public education
2. District Identity & Board Processes — Who we are and how we do things
3. Professional Development — IASB workshops, reading

Many boards address one or two of these orientation tasks, but excellence likely requires all three. While there is no right or wrong order in the way to accomplish these tasks, giving new board members access to important documents that relate to their ability to understand the issues should be one of the first tasks.

Graphically, the process might look like this ...



Illinois Association of School Boards (IASB) is an association of public boards of education. Its mission is excellence in local school governance and support of public education. IASB provides this orientation guide to school boards to help them assist new board members to become effective members of the board and to ensure a continuity of leadership for the school district.

Nuts & Bolts: Orientation to the District and Public Education

Board members must be properly and thoroughly informed about the school district they serve as well as the role and responsibilities of a board member. The information listed below will provide an excellent starting place for this task. Ideally, this information will be shared during a face-to-face meeting between the new board member(s) and the superintendent and board president. Generally, the board president assumes responsibility for orientation around board processes while the superintendent takes the lead on orientation to the district. This list is organized by location of the items.

Available from the local board policy manual:

- Board mission/vision statements and district belief/vision statements — these may be found throughout the policy manual according to the subject
- Board processes, including expense reimbursement, types of board meetings, board meeting procedure, agenda preparation and policy development
- Communication issues, including use of e-mail and communicating with media
- Code of Conduct for members of school boards and conflict of interest criteria
- District intergovernmental agreements
- District organizational chart

Available from the superintendent or local district website:

- Open board meeting minutes from the previous year
- Most recent Annual Financial Report, auditor's report, and other financial information including Tax Increment Financing (TIF) schedules
- District Improvement Plans and School Improvement Plan(s)
- Contracts, including any collective bargaining agreements between the district and certificated (teachers) and noncertificated personnel, and superintendent's contract.
- Important calendars, including regular board meeting and budget calendars
- Important handbooks, such as personnel and student handbooks
- Summary of pending litigation involving the district
- Special reports, including facilities assessments, curriculum studies, results of recent community surveys, enrollment trends and NCLB status of school(s) and district

Available from the Illinois Association of School Boards at www.iasb.com:

- IASB *Foundational Principles of Effective Governance*
- Descriptions of IASB publications and new board member workshops
- Legal calendar containing deadlines provided in statute
- Information about state laws including the Open Meetings Act, Freedom of Information Act and conflict of interest laws
- Legislative information, including how to contact legislators
- Free materials and resources at https://www.iasb.com/training/sch_bd_resources.cfm

Available from the Illinois State Board of Education at www.isbe.net:

- Information to assist and support the work of school districts, policymakers and Illinois residents
- Information about the federal No Child Left Behind Act (NCLB) and its implementation in Illinois

Available from Interactive Illinois Report Card at <http://iirc.niu.edu>:

- Current School Report Cards
- School information searchable by school, district, city or county

Available by ordering from IASB's online bookstore at www.iasb.com/shop:

- *The Effective School Board Member*
Provides an overview of what a school board member needs to know, including powers and duties, “do’s and don’ts,” the structure of school governance, finance, board/administrator/staff relations, board meeting procedures, a code of ethics, etc.
- *Coming to Order — A Guide to Successful School Board Meetings*
Designed for boards that hope to use their meetings to reach a higher level of performance as well as those that simply need a cure for ineffective meetings, this book explains how to plan and conduct meetings that meet the needs of the individual school board.
- *Essentials of Illinois School Finance*
Originally designed as a training manual and desk-top reference for school business managers and budget makers, this book also provides an effective reference for anyone who needs to understand the essentials of Illinois school finance.
- *Illinois School Code Service*
A compendium of current school law and related acts.

- *Illinois School Law Survey*
A convenient resource written in plain English that answers legal questions for educators and laymen.
- *Collective Bargaining and the Illinois School Board Member*
A practical perspective on school labor relations reflecting state laws and local realities in Illinois.
- *School Official's Guide to Student Disciplinary Hearings*
A review of laws governing student suspensions and expulsions in Illinois and step-by-step suggestions for organizing and conducting suspension/expulsion hearings.

Check the online bookstore for availability and pricing.

Available from the National School Boards Association (NSBA) at www.nsba.org:

- Information about NSBA's Annual Conference & Exposition
- Public education news and issues
- Information about federal laws that affect your schools

Available from The Center for Public Education at www.centerforpubliceducation.org:

- Accurate, timely and credible information about public education
- Research, data, and analysis on current education issues

District Facilities: In addition to sharing information, the superintendent and/or board president should conduct a tour of district facilities for any new board member(s) who might desire it.

Board Mentors: The board also may want to offer a mentor relationship for a new board member with an existing board member. While this might not be necessary in all districts, for some it might provide a way to offer continued guidance and a more comfortable way of asking questions about the district and its processes. Sample IASB policy on Board Member Development regarding mentors is an appendix to this information, as is a sample letter with guidelines for a school board member serving as a mentor.

Sample Nuts & Bolts Agenda

Orientation to the District and Public Education

Superintendent & Board President — with new members
Post as committee meeting

	Approximate time
Welcome to the Board of Education	10 minutes
<i>a) Role of Board Policy</i>	
<i>b) Committees of the Board</i>	
<i>c) Conflict of interest, ethics, gift ban, prohibited political activity</i>	
Board/Superintendent Relationship	20 minutes
<i>a) Goals, expectations, job description</i>	
<i>b) Responsibilities within and beyond the district</i>	
<i>c) Contract and evaluation process</i>	
<i>d) Communications, chain of command</i>	
School Finance	20 minutes
<i>a) Budget and amended budgets</i>	
<i>b) Revenue and expenditures</i>	
<i>c) Accountability: monthly reports and yearly audit</i>	
Instructional Program	10 minutes
<i>a) Organization of attendance centers</i>	
<i>b) Regular, special, and support programs</i>	
<i>c) Student achievement, assessment, reporting</i>	
<i>d) Student handbook process</i>	
<i>e) Extra-curricular program and athletic code process</i>	
Personnel	10 minutes
<i>a) Staffing levels (teachers, staff, administration)</i>	
<i>b) Labor contract status and negotiations process</i>	
School Community Relations	10 minutes
<i>a) Relationships with the PTA, booster clubs, foundations</i>	
<i>b) District memberships, cooperatives</i>	
Important issues in the future	5 minutes
Assessment: <i>What topics can we cover in more detail?</i>	
<i>What other issues can be added to future orientation meeting agendas?</i>	5 minutes
Adjournment	

Total time = 90 minutes

District Identity & Board Processes: Building the New School Board Team

Two conversations about the basics

Whenever new members join the governance team (one or more board members, or a new superintendent) it is valuable to go “back to the basics.” Two board conversations are called for: one involving district identity and the other involving board processes. In addition to having valuable conversations about the district, the meetings will allow members to get to know each other and hear the various perspectives around the table.

Sample Meeting Agendas: We have provided two draft agendas to facilitate the board’s conversation around these two important topics. Many boards will want to schedule a “special meeting” for this work, which must be done in open session. Others might take an hour or more on a regular meeting night for these conversations.

The board might do these two conversations in whatever order it finds most compelling. Go with the board’s energy — which seems like the easier, or most pressing, conversation.

Included with each agenda you will find **Key Questions** that the new team will want to keep in mind as they begin their discussion. Additionally, you will want to provide any relevant **Supporting Documents**. Every board has existing documents that will support and inform these conversations. A list of suggested documents that would be helpful for each session is provided. Gather those which are available and helpful. Participants would likely benefit in thinking about these questions and reviewing the supporting documents prior to the discussion.

Note: Many boards can have a productive conversation without outside facilitation. However, some boards will find it helpful to have an objective facilitator for these conversations. If you are interested in having someone from IASB facilitate the discussion, please contact your field services director.

Conversation A: District Identity

Overarching questions: *Who are we? What do we care about? What are we trying to do?*

How much time should be allocated to this conversation? One approach is to allocate 90 minutes and see how it goes. Perhaps it will not take the full amount of time, or the board may choose to return to the conversation on another occasion.

Key Identity Questions:

1. What is our district's direction, focus, vision, mission, core values or beliefs?
2. Do we have a plan to move our district forward: District goals? Strategic plan? Areas of focus?
3. How have we communicated our direction, plans, etc. to the district's stakeholders? Is there widely shared agreement regarding our vision and direction?
4. How does the board relate to the community? How are the district and community connected? How would we like to be connected?
5. How do the community, district and board communicate with one another?
6. What important events have happened in our district's recent (20 years) history?
7. How are we doing as a district? How do we know how we are doing? By what/whose criteria to we measure how we are doing?

Supporting Local Identity Documents:

- Missions/Vision statements
- District Beliefs/Values
- Areas of district focus
- Long-range goals
- Annual goals/report on progress
- Superintendent performance-based contract goals
- District and/or School Improvement Plans
- Illinois State Report Cards
- Reports on recent projects and/or initiatives
- What else?

Meeting Agenda A: District Identity

	Approximate time
Call to Order, roll call + (your regular meeting start)	
Public comment	
Sharing personal stories and “mental models”: <i>Invite each person to share a moment in the district’s history that is personally seen as a turning point, identity moment, key event.</i>	30-45 minutes
Review of existing documents: <i>Ask continuing members to share how the various district identity documents (see list) came to be:</i> <ul style="list-style-type: none"> a) Date created b) Authors c) Use to this point 	20 minutes
Review District Beliefs and/or Values: <i>Invite members to share: Which do I personally find most compelling? Which are questions for me? On which do I wonder whether we have agreement? (If the district does not have a written list of beliefs, discuss the value of scheduling time to create a beginning list.)</i>	20 minutes
Consider: <i>What’s missing? Do we have basic agreements about our district’s identity that we have not written down? Should we? See Key Questions list.</i>	10 minutes
Next steps: <i>Are there any appropriate next steps this board is ready to agree on and schedule for a subsequent meeting?</i>	10 minutes
Assessment: <i>How did we do? What can be improved?</i>	5 minutes
Adjournment	

Total time = 90 minutes

Conversation B: Governance Team Process Basics

Overarching questions: *How does this team do business? What's expected around the table? Do we have agreement regarding our processes?*

Again, the amount of time that you allot should be determined by your board and your conversation. You may wish to begin with 90 minutes or adjust the time to your individual district needs and schedules.

Key Process Questions:

1. To whom is the board accountable? How do we exercise/assure our accountability?
2. What does the board understand its role/job to be?
3. What does the board understand the role/job of a board member to be?
4. What does the board understand the role/job of the superintendent to be?
5. How does the board nurture an effective and responsible relationship with the superintendent?
6. How are the superintendent and staff accountable to the board? How does the board assure this accountability?
7. Does the board delegate some responsibilities to the superintendent/staff? Why? What does good delegation look like?
8. Who is responsible for the board's work and behavior?
9. How are we doing as a board? How do we know how we are doing? By what/whose criteria to we measure how we are doing?
10. What does an efficient and effective school board meeting look like? How can we plan for good meetings?

Supporting Documents:

- Board process policies (Section 2 in the IASB numbering system)
- Other existing documents recording board agreements
- Recent board self-evaluation reports
- IASB governance materials:
 - ✓ *IASB Governance Basics* — Available from your field services director
 - ✓ *The Effective School Board Member* — Available for purchase at www.iasb.com
 - ✓ *Coming to Order — A Guide to Successful School Board Meetings* — Available for purchase at www.iasb.com
- What else?

Meeting Agenda B: Governance Team Process Basics

	Approximate Time												
Call to Order, roll call + (your regular meeting start)													
Public comment													
The Legacy of this Board: <i>Invite each person to share an item they would like folks to be able to say about <u>this board</u> in two years.</i>	20 minutes												
Review existing documents: <i>Ask continuing members to share how the various district process documents (see list) came to be:</i> a) Date created b) Authors c) Use to this point	10 minutes												
IASB Governance Basics & Board Process Agreements: <i>Do you have agreement on some common process questions?</i> <table border="0" style="margin-left: 20px;"> <tr> <td>Placing items on the agenda</td> <td>Participating during public forums</td> </tr> <tr> <td>Asking agenda questions</td> <td>Communicating with members</td> </tr> <tr> <td>Communicating with staff</td> <td>Visiting campuses</td> </tr> <tr> <td>Responding to complaints</td> <td>Communicating with the media</td> </tr> <tr> <td>Communicating with the public</td> <td>Orienting new members</td> </tr> <tr> <td>Conducting closed sessions</td> <td></td> </tr> </table> <i>IASB field staff are prepared to offer best practice guidelines for boards desiring some help.</i>	Placing items on the agenda	Participating during public forums	Asking agenda questions	Communicating with members	Communicating with staff	Visiting campuses	Responding to complaints	Communicating with the media	Communicating with the public	Orienting new members	Conducting closed sessions		30 minutes
Placing items on the agenda	Participating during public forums												
Asking agenda questions	Communicating with members												
Communicating with staff	Visiting campuses												
Responding to complaints	Communicating with the media												
Communicating with the public	Orienting new members												
Conducting closed sessions													
Consider: <i>What's missing? Do we have basic agreements about our processes that we have not written down? Should we? See Key Questions list.</i>	15 minutes												
Next steps: <i>Are there any appropriate next steps this board is ready to agree on and schedule for a subsequent meeting?</i>	10 minutes												
Assessment: <i>How did we do? What can we improve for next time?</i>	5 minutes												
Adjournment													
Total time =	90 minutes												

New Board Member Professional Development

Encourage your newly elected board members to begin their career with a personal professional development plan. In the months immediately following school board elections (April of odd-numbered years), IASB offers regional workshops to help new board members get a fast start toward productive board service.

This series of workshops is designed to cover all the basics — school district governance, the legal requirements of board meetings and practices, board presidents' duties, and school district finance.

Dates and locations for the workshops are announced in the spring. Workshop pricing and registration information is mailed to each district. Online brochures and registrations for these events can also be found on IASB's online calendar: <https://www.iasb.com/calendar/>.

Continue growing: An extensive offering of workshops is available from IASB. Most workshops are presented within the framework of *School Board LeaderShop*, a curriculum of core and elective workshops for school board learning and networking. Core programs directly relate to principles of effective school district governance; elective programs focus on additional board and board member skills that promote effective school district leadership. In addition, IASB field services staff can develop and deliver a wide range of workshops in your district to meet the needs of your board and superintendent team. See www.iasb.com or contact your field services director for a field services catalog.

Joint Annual Conference: Each November (on the weekend prior to Thanksgiving), the Illinois Association of School Boards, along with the Illinois Association of School Administrators and Illinois Association of School Business Officials sponsor a state conference for public school leaders. Recognized as one of the largest education conferences in the nation, this event features a wide array of panel sessions, tours, exhibits, workshops and general sessions. Information is mailed to school districts in June, and is updated continuously at www.iasb.com.

NSBA: The National School Board Association, of which IASB is a Federation member, is another important source for board member development and information. See www.nsba.org.

Appendix

June 2008

2:120

School Board

Board Member Development ¹

The School Board desires that its individual members learn, understand, and practice effective governance principles. ² The Board is responsible for Board member orientation and development. Board members have an equal opportunity to attend State and national meetings designed to familiarize members with public school issues, governance, and legislation.

The Board President and/or Superintendent shall provide all Board members with information regarding pertinent education materials, publications, and notices of training or development.

Board Self-Evaluation

The Board will conduct periodic self-evaluations with the goal of continuous improvement. ³

New Board Member Orientation ⁴

The orientation process for newly elected or appointed Board members includes:

1. The Board President or Superintendent, or their designees, shall give each new Board member a copy of or online access to the Board Policy Manual, the Board's regular meeting minutes for the past year, and other helpful information including material describing the District and explaining the Board's roles and responsibilities.
2. The Board President or designee shall schedule one or more special Board meetings, or schedule time during regular meetings, for Board members to become acquainted and to review Board processes and procedures.
3. The Board President may request a veteran Board member to mentor a new member. ⁵
4. All new members are encouraged to attend workshops for new members conducted by the Illinois Association of School Boards.

Candidates

The Superintendent or designee shall invite all current candidates for the office of Board member to attend: (1) Board meetings, except that this invitation shall not extend to any closed meetings, and (2) pre-election workshops for candidates.

LEGAL REF.: 5 ILCS 120/2.

The footnotes are not intended to be part of the adopted policy; they should be removed before the policy is adopted.

¹ This optional policy is up to the local board's discretion.

² The IASB "Foundational Principles of Effective Governance" is available online at www.iasb.com.

³ Boards are not required to conduct self-evaluations, but may hold a closed meeting with representatives of a State association authorized under Article 23 of The School Code for the purpose of discussing self-evaluation practices and procedures, or professional ethics (5 ILCS 120/2(B)(6)).

⁴ New board member orientation is a critical step in helping new board members become effective and in promoting a smooth functioning *new team*. The first paragraph should be customized to add references to the IASB policy services that the district receives (e.g., **PRESS**, **PRESS Online**, **School Board Policies Online**, and **PRESS Plus**).

⁵ See 2:120-E, *Guidelines for Serving as a Mentor to a New School Board Member*.

July 2006

2:120-E

School Board

Exhibit - Guidelines for Serving as a Mentor to a New School Board Member

On District letterhead

Date

Dear School Board Member:

Congratulations on being asked to serve as a mentor to a new Board member. The goal of the mentoring program is to orient a new Board member to the Board and District and to help him or her be comfortable, develop self-confidence, and become an effective leader. Follow these guidelines to maximize your mentoring effectiveness.

1. Be a good mentor by sharing your knowledge and experiences with others. Take a personal interest in helping others succeed.
2. Try to develop an informal, collegial relationship with the new Board member – explain that you are there to help. Listen respectfully to all concerns and answer questions honestly.
3. During your first contact with the new Board member, introduce yourself and explain that you will serve as his or her mentor and are looking forward to sharing information about the Board and District. If possible, meet with the individual to become acquainted. Be available as needed to provide assistance, advice, and support. The Superintendent's office will have already sent the new Board member a copy of the Board's policies as well as other helpful material.
4. Be prepared to introduce the new Board member at upcoming Board events until he or she becomes a familiar face.
5. Be available and maintain a helpful attitude. You will assist the new Board member become an effective member of the Board and ensure skilled and knowledgeable future leadership for the District.

Being a mentor can bring rewards to you, the new Board member, and the District. Thank you for your assistance and commitment.

Sincerely,

School Board President

2:120-E

Page 1 of 1

Congratulations!

If your school board/superintendent team has completed the work plan laid out in this publication and discussed and/or scheduled professional development opportunities, your district is well on its way to having a high-performing administrative team. If you have any questions about these materials or would like IASB staff to facilitate a District Identity or Board Processes session, please contact the field services staff at our Springfield office by calling 217/528-9688 or at our Lombard office by calling 630/629-3776.



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