

# Orientation

## Building the Board Team



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# Overview

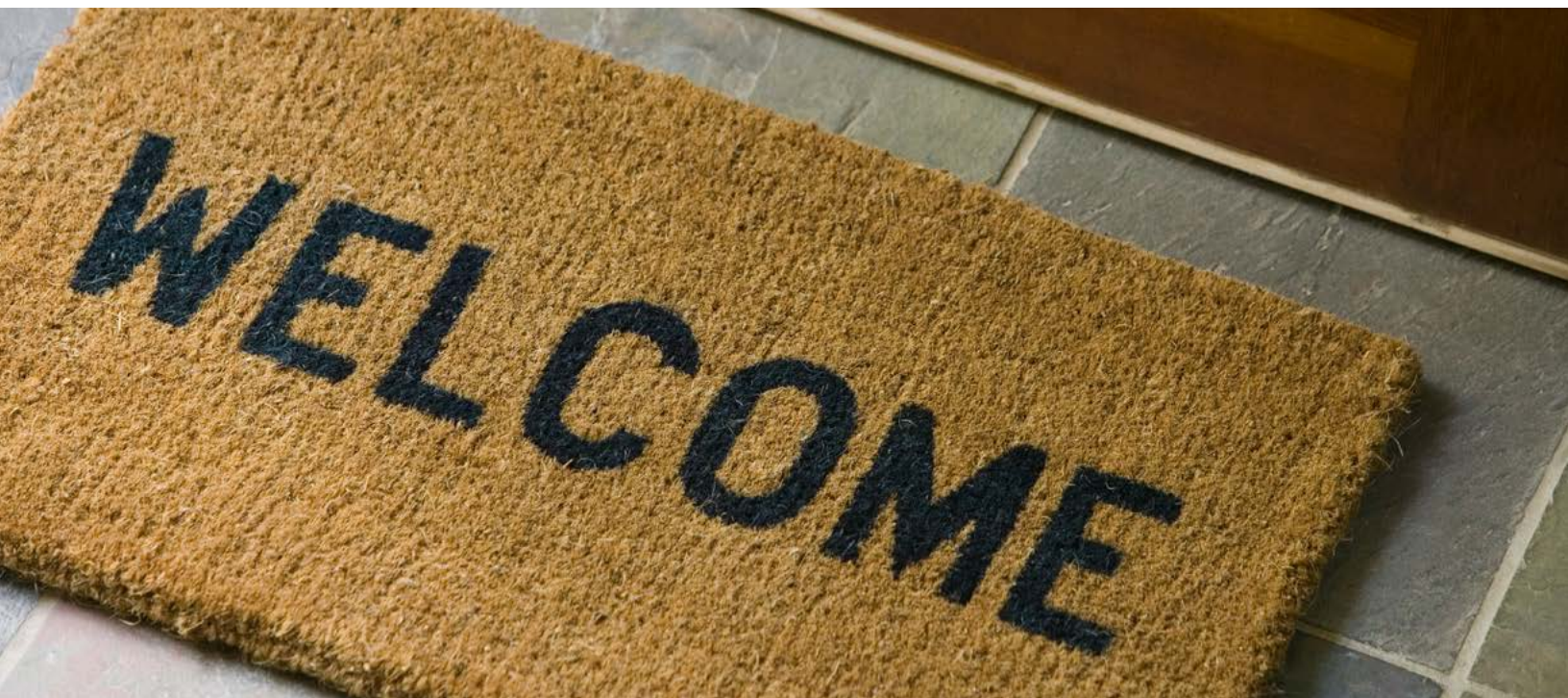
In order to become a high-performing team, each board must address the orientation needs of new board members and the development of the “new” team. IASB staff has developed these materials to help school boards orient newly elected or appointed board members to their position. Two agendas with accompanying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

The first orientation step is an introduction to the current state of your school district including a review of current projects, strategic plans, district finances, collective bargaining agreements, and key staff contracts. This meeting, which involves numerous 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 may need to be posted and conducted as an open meeting.

The second step is a meeting designed to focus on the work of the board, the work it does and how it chooses to do this work. This meeting of the full board is intended to set the norms for communication, roles

and responsibilities, meeting processes, and other board protocols. While some boards may wish to follow the agenda and conduct the meeting on their own, other boards may feel more comfortable with an outside facilitator. Contact your IASB Field Services Director to discuss a Starting Right session for your board.

One 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.

New boards, being good stewards of community resources and focused on the business at hand, may find it helpful to set aside time for team building. 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.”

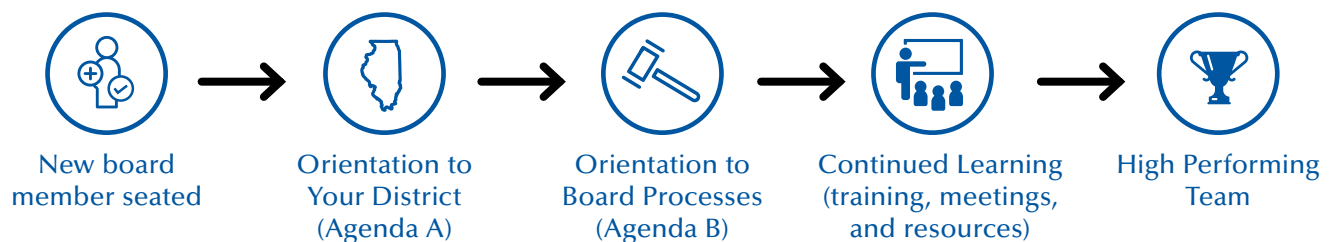
Each member of the board has the potential to make an important contribution. Every new board also has the potential to create a high-performing governance team. Getting to that destination of a high-performing board involves providing new board members with the information they will need to effectively do their job, building the new team, and pursuing learning opportunities.

The three distinct activities are:

1. **Orientation to your district** - What important issues require board member attention right now? What impact will these issues have on our long term goals? What important board decisions are coming within the next year?
2. **Orientation to board processes** - How do we run our meetings? How do we communicate effectively with one another? How do we effectively govern the school district within our roles as board members?
3. **Continued learning** – IASB training, meetings, and resources

Boards will want to schedule all of these orientation tasks in order to effectively on-board new members. There is no right or wrong order to these activities. In fact, some orientation tasks may begin before a member is seated. In all cases, it is in the board’s best interest to welcome new members with all the information they need in order to effectively represent the community.

Graphically, the process might look like the figure below.



# Information Resources

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 email and communicating with media
- Code of Conduct for members of school boards and conflict of interest criteria
- District intergovernmental agreements
- District organizational chart
- Contracts, including any collective bargaining agreements between the district, teachers and support personnel, and the superintendent's contract
- Calendars, including regular board meeting and budget calendars
- 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 ESSA status of school(s) and district

## 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
- Strategic Plans and or District Improvement Plans

## Available from the Illinois Association of School Boards at [www.iasb.com](http://www.iasb.com):

- Foundational Principles of Effective Governance and other school board governance resources
- New board member training
- Legal calendar containing deadlines provided in statute
- Information about state laws including the Open Meetings Act, Freedom of Information Act, and conflict of interest

- Legislative information, including how to contact legislators and summaries of bills impacting public education
- Free pamphlets and tools
- IASB publications available to purchase from the IASB Online Bookstore:
  - *The Effective School Board Member* — This handbook provides an overview of what a school board member needs to know, including duties and responsibilities, the structure of school governance, financing the schools, relations with administration and staff, board meeting procedures, a code of conduct, 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, this book explains how to plan and conduct meetings that meet the needs of the individual school board and serve the interests of both school and community.
  - *Essentials of Illinois School Finance* — A reference for school budget makers and anyone who needs to understand school finance.
  - *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* — This book provides practical insights into school labor relations in the context of Illinois law.

Available from the Illinois State Board of Education at [www.isbe.net](http://www.isbe.net):

- Information, policies, and guidelines to assist and support PK-12 education in Illinois
- Information regarding the status of state and federal program implementation
- School data searchable by school, district, city, or county ([www.illinoisreportcard.com](http://www.illinoisreportcard.com))

**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 publication, as is a sample letter with guidelines for a school board member serving as a mentor.



# SAMPLE AGENDA A

## Orientation to Your District

*Superintendent and board president with new members  
Post as committee or board meeting if applicable*

### Welcome to the Board of Education

- a) What is the current focus of the district? District goals? Strategic plan?*
- b) Role of Board Policy*
- c) Committees of the Board*
- d) Conflict of interest, ethics, gift ban, and prohibited political activity*

### Board/Superintendent Relationship

- a) Goals, expectations, job description*
- b) Responsibilities within and beyond the district*
- c) Contract and evaluation process*
- d) Communications, chain of command*

### School Finance

- a) Budget and amended budgets*
- b) Revenue and expenditures*
- c) Accountability: monthly reports and yearly audit*

### Instructional Program

- a) Organization of attendance centers*
- b) Regular, special, and support programs*
- c) Student achievement, assessment, reporting*
- d) Student handbook process*
- e) Extra-curricular program and athletic code process*

### Personnel

- a) Staffing levels (teachers, staff, administration)*
- b) Labor contract status and negotiations process*

### School Community Relations

- a) Relationships with the PTA, booster clubs, foundations*
- b) District memberships, cooperatives*

### Important issues in the future

#### Assessment

- What topics can we cover in more detail?*
- What other issues can be added to future orientation meeting agendas?*

#### Adjournment

## SAMPLE AGENDA B

# Orientation to Board Processes

Note: An IASB Field Services Director is available to assist your board.  
Ask for the *Starting Right* in-district workshop.

Call to Order, roll call + (your regular meeting start)

Public comment

### Objectives

- *Create a process for the new board governance team*
- *Consider and clarify board/superintendent roles and responsibilities*
- *Discuss working relationships and expectations for the team*
- *Identify next steps and board development efforts*

### The Legacy of this Board

*Invite each person to share an item they would like community members to be able to say about this board in two years.*

### Review existing board protocol documents (if available)

*Ask continuing members to share how the various board processes (see list) came to be:*

- a) Date created*
- b) Authors*
- c) Use to this point*

### Consider board protocols in order to support the board's work

*Do you have agreement on some common process questions?*

- |                                      |   |
|--------------------------------------|---|
| <i>Placing items on the agenda</i>   | <i>Participating during public forums</i> |
| <i>Asking agenda questions</i>       | <i>Communicating with members</i>         |
| <i>Communicating with staff</i>      | <i>Visiting schools</i>                   |
| <i>Responding to complaints</i>      | <i>Communicating with the media</i>       |
| <i>Communicating with the public</i> | <i>Orienting new members</i>              |
| <i>Conducting closed sessions</i>    |   |

*IASB Field Services Directors are prepared to offer best practice guidelines for boards desiring some help.*

### Consider

*What's missing? What common processes need to be included in our board protocols?*

### Next steps

*Are there any appropriate next steps this board is ready to agree on and schedule for a subsequent meeting?*

### Assessment

*How did we do? What can we improve for next time?*

### Adjournment



# New Board Member Training and *Beyond*

New board members will want to get up to speed quickly regarding their legal obligations, learn their role as a member of the governance team and connect with other members from across Illinois. The content within this pamphlet focuses on the board's responsibility to orient the new member to the work of your board. In addition to this local orientation, it is important for new members to grow and learn as individual board members. The support of members from other districts and the opportunity to connect to the expertise of IASB will be invaluable as they begin this new journey. We encourage you to consider the following activities for new board members:

**New Board Member Training:** New school board members must meet state-mandated training requirements including Professional Development Leadership Training with PERA and Open Meetings Act Training. These requirements, along with IASB's Basics of Governance are essential to the success of the new school board members. Look for more information at [www.iasb.com](http://www.iasb.com) regarding these and other new board member training opportunities.

**IASB Webinars and Online Learning:** New school board members will find a wealth of information at [www.iasb.com](http://www.iasb.com) including live webinars, archived webinars, and online learning courses.

**Division Meetings:** Every fall and spring, each of IASB's 21 divisions hosts a meeting with a business function and educational programming. Hear from Association leaders and keynote/panel speakers regarding relevant topics to Illinois public education. The locations are convenient and the connections are invaluable.

**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, sponsors a statewide 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, exhibits, workshops, and general sessions, as well as ample opportunities to network with fellow school board members.

**Continue growing and leading:** An extensive offering of in-district workshops is available from IASB including Starting Right, Board Governance Review, Basics of Governance, Equity: an Educational Imperative, and much more. Learning together will move your board forward as a governance team and help you make an impact.

For more information on these and the many other programs, contact IASB Field Services staff.

# Appendix

October/November 2018

2:120

## School Board

### Board Member Development <sup>1</sup>

The School Board desires that its individual members learn, understand, and practice effective governance principles.<sup>2</sup> 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.

### Mandatory Board Member Training <sup>3</sup>

Each Board member is responsible for his or her own compliance with the mandatory training laws that are described below:

1. Each Board member elected or appointed to fill a vacancy of at least one year's duration must complete at least four hours of professional development leadership training in education and labor law, financial oversight and accountability, and fiduciary responsibilities within the first year of his or her first term. <sup>4</sup>
2. Each Board member must complete training on the Open Meetings Act no later than 90 days after taking the oath of office for the first time. After completing the training, each Board member must file a copy of the certificate of completion with the Board. Training on the Open Meetings Act is only required once. <sup>5</sup>
3. Each Board member must complete a training program on evaluations under the Performance Evaluation Reform Act (PERA) before participating in a vote on a tenured teacher's dismissal using the optional alternative evaluation dismissal process. This dismissal process is available after the District's PERA implementation date. <sup>6</sup>

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

<sup>1</sup> State law governs the mandatory board member training provisions in this sample policy.

<sup>2</sup> The IASB *Foundational Principles of Effective Governance* is available online at: [www.iasb.com/principles.cfm](http://www.iasb.com/principles.cfm).

<sup>3</sup> A board may omit the description of mandatory training requirements by deleting "~~that are described below~~" and deleting the numbered list.

<sup>4</sup> 105 ILCS 5/10-16a.

<sup>5</sup> 5 ILCS 120/1.05(b) and (c). IASB is an authorized provider of this training.

<sup>6</sup> 105 ILCS 5/24-16.5. This mandatory training requirement was phased-in as districts implemented evaluations that incorporate student growth as a significant factor, otherwise known as Performance Evaluation Reform Act (PERA) evaluations. The implementation timeline for PERA evaluations varied from district to district but all districts must implement PERA evaluations. After the implementation of PERA evaluations, a district may use an optional alternative evaluative dismissal process using the PERA evaluation. Before voting on a dismissal based upon an optional alternative evaluative dismissal process, a board member must complete a training program on PERA evaluations. IASB is an authorized provider of this training. For more information about PERA, see *PERA Overview for School Board Members*, [iasb.com/law/pera.cfm](http://iasb.com/law/pera.cfm).

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The Superintendent or designee shall maintain on the District website a log identifying the complete training and development activities of each Board member, including both mandatory and non-mandatory training. <sup>7</sup>

Professional Development; Adverse Consequences of School Exclusion; Student Behavior <sup>8</sup>

The Board President or Superintendent, or their designees, will make reasonable efforts to provide ongoing professional development to Board members about the adverse consequences of school exclusion and justice-system involvement, effective classroom management strategies, culturally responsive discipline, appropriate and available supportive services for the promotion of student attendance and engagement, and developmentally appropriate disciplinary methods that promote positive and healthy school climates.

Board Self-Evaluation

The Board will conduct periodic self-evaluations with the goal of continuous improvement. <sup>9</sup>

New Board Member Orientation <sup>10</sup>

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. <sup>11</sup>
4. All new members are encouraged to attend workshops for new members conducted by the Illinois Association of School Boards.

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

<sup>7</sup> 105 ILCS 5/10-16a requires each school district to post on its website, if any, the names of all board members who have completed the minimum of four hours of training described in #1. Recognizing that a board may want to highlight all training and development achievements, the sample policy extends this reporting requirement to all training and development activities. For a website reporting template, see 2:120-E2, *Website Listing of Development and Training Completed by Board Members*.

A board may choose to strictly follow the statute by using the following alternative: “The Superintendent or designee shall post on the District website the names of all Board members who have completed the professional development leadership training described in number 1, above.”

<sup>8</sup> Optional. 105 ILCS 5/10-22.6(c-5), amended by P.A. 100-810, eff. 1-1-19. Information about professional development opportunities is available through IASB’s Online Learning Center (OLC). Inquire at: [onlinelearning@iasb.com](mailto:onlinelearning@iasb.com).

<sup>9</sup> 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).

<sup>10</sup> 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**.

<sup>11</sup> See 2:120-E1, *Guidelines for Serving as a Mentor to a New School Board Member*.

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 120/1.05 and 120/2.  
105 ILCS 5/10-16a and 5/24-16.5.

CROSS REF.: 2:80 (Board Member Oath and Conduct), 2:125 (Board Member Compensation; Expenses), 2:200 (Types of School Board Meetings)

July 2016

2:120-E1

## **School Board**

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

*On District letterhead*

Date

Dear School Board Member:

Thank you for agreeing 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 provided the new Board member with a web link or paper 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 in becoming an effective member of the Board and ensuring 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-E1

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## School Board

### Exhibit - Website Listing of Development and Training Completed by Board Members

*District webmaster: Post this template (including the explanatory paragraphs) on the District's website and update the table as information is provided.*

Each Illinois school board member who is elected or appointed to fill a vacancy of at least one year's duration must receive *professional development leadership* training (PDLT) and *Open Meetings Act* (OMA) training. Mandatory training is also required upon *Performance Evaluation Reform Act* implementation in each school district. For additional information, see Board policy 2:120, *Board Member Development*.

The following table contains mandatory and non-mandatory training and development activities that were completed by each Board member. When the training was provided by the Illinois Association of School Boards, the acronym "IASB" follows the listed activity.

| Name | Development and Training Activity<br>and Provider | Date Completed |
|------|---|----------------|
|      |   |                |
|      |   |                |
|      |   |                |
|      |   |                |
|      |   |                |
|      |   |                |

The Illinois Association of School Boards (IASB) is a voluntary organization of local boards of education dedicated to strengthening the Illinois public schools through local citizen control. Although not a part of State government, IASB is organized by member school boards as a private not-for-profit corporation under authority granted by Article 23 of the School Code. The vision of IASB is excellence in local school board governance supporting quality public education.

For more information regarding IASB and its programs, visit [www.iasb.com](http://www.iasb.com).



