



# New Board Member Orientation

## Post Election: Before July 1<sup>st</sup>

*While newly elected candidates will not take office until July 1<sup>st</sup>, there is plenty of they can do and items a board secretary can get to them, so they are prepared when their term starts. Have these items ready before election day. Tip: Set the expectation that new members will have to study. Come July 1<sup>st</sup> there will be a very large amount of information they will need to learn.*

## Activities

- Meet with the board secretary
- Register for OSBA Summer Conference (or get prepared to register on July 1)
- Review the last three months of board meeting minutes

## Basic Information

- Official name of the district/college
- Main phone number
- Other key web addresses and phone numbers
- Number of employees (exempt, licensed, and classified)
- Departments and what they do (briefly)
- List of board members with zone and contact info
- District/college address
- District/college website
- Communities served
- Key district email (chair, supt., board secretary)
- Organizational chart (bios/photos of staff)

## Demographic

- List of schools and enrollment
- district/school demographics where available
- boundary maps

## Policy

- Policy BHA - Orientation of New Board Members

## Training

- [Welcome](#) from OSBA
- [Code](#) of Conduct
- [Tips](#) for new board members

## Month of July

*When a new member takes office there is a staggering amount of information they need to learn and items they need at their fingertips in their first month. For the board secretary there is a large amount of coordination of people to support the onboarding of new board members. Start planning this process right after the election, especially if there are more than a couple positions changing.*

### Activities

- Watch OSBA New Member Orientation [Webinar](#)
- Meet with the Superintendent and Board Chair
- Sign into/get trained on Board Book (or other platform)
- Attend OSBA Summer Conference
- Read OSBA Boardsmanship [Guide](#)
- Sign into their OSBA account
- Subscribe to OSBA OREdNews emails

### Protocols

There is a very large number of logistic and procedural items that need to be accomplished as quickly as practicable after a new member's term begin. Additionally, there are many skills and processes new members need to learn quickly to be most effective, especially communication protocols and meeting procedures.

### Communications

- Set up district/college email service
- Example email signature and legal disclaimers
- Guidelines for use of social media
- Quorum restrictions on communication
- IT agreement for email account (as applicable)
- District Mobile App (if applicable)
- Text message protocol
- Communication with staff guidelines (see Policy BG/GBD)

### Meetings

- Annual board meeting calendar
- Order of business and how agenda is set
- Board member comments in meetings
- Distribution and preparation of the board meeting materials
- Community Engagement/Committee or sub-committee calendars
- Parliamentary procedure quick reference sheet
- Instructions on how members of the public can provide input to the school board (See Policy BDDH)

## Governance

- Vision, mission, and guiding principles
- One-page summary of the annual budget
- Bond overview report (if applicable)
- Read the Board-Superintendent Operating Agreement (if applicable)
- District and/or building goals
- Long range fiscal plan
- Read the Board Operating Agreement (if applicable)
- Recent resolutions

## Policy

There are several policies that are foundational to the smooth and collaborative function of a school board. New members will need to become familiar with all of those listed here.

- Policy BA - Board Role & Goals
- Policy BBAA - Individual Board Member Authority & Responsibilities
- Policy BBFA - Board Member Ethics & Conflict of Interest
- Policy BG/GBD - Board-Staff Communications
- Policy - BBA Board Powers & Duties
- Policy BBF - Board Member Standards of Conduct
- Policy BBFB - Board Member Ethics and Nepotism
- Policy KL - Public Complaints

## August - September

*Board members will have taken in much of the basics of being on the school board and should have the rest close at hand. In the latter part of summer, many boards have retreats for planning and new members will need materials to make the most of that time.*

### Activities

- Tour district facilities
- Review OSBA Basic Roles and Responsibilities Handbook
- Read OSBA Parliamentary Procedure Guide
- Detailed review of student outcome data
- Read OSBA Public Meeting Law Guide
- Attend district equity training

### Policy

- Policy AE – District Goals
- [ORS 192.660](#) Executive Session
- Policy BDDH – Public Comment at Board Meetings

### Protocols

- School Visitation (See Policies BBAA and KK)
- Requests for information (See Policy BBAA)

### Meetings

- Dates for any other annual events, celebrations, etc. related to the board
- Check in on parliamentary/meeting procedures
- Board Awards (criteria, typical timelines)

## Fall: October – January

*While new board members will have had much of what they must know presented to them by the beginning of the school year, they will still have to learn to put it into practice. They will need to keep materials close at hand and have opportunities to ask plenty of questions.*

### Activities

- Regular check in with board chair or mentor
- Review OSBA Board Chair Guide
- Review OSBA Oregon School Bond Manual
- Attend OSBA Annual Conference
- Regular one-on-one or small group meetings with Superintendent
- Review OSBA Budget Committee Handbook
- Targeted offerings from [OSBA Board Development](#) and [training/webinars](#)