Resources for New Member Transitions

Transition Program Ideas

For Board Candidates

- Invite them to attend board meetings
- Present a candidate workshop

For New Board Members

- Conduct a formal transition meeting
- Provide a thorough local orientation
- Establish a mentor program
- Attend training events as a team
- Schedule social events
- Assemble a board handbook or district briefing book
- Distribute copies of any written team operating procedures

For New Superintendents

- Conduct a formal transition meeting
- Collect in advance and provide the following information:
  1) District policies
  2) District plans and goals
  3) District budget summary
  4) District calendar of events
  5) Board calendar of events
  6) Board operating procedures
Transition Meeting Outline

Purpose

Transition meetings identify and share information about two general areas:

1) Tasks: Identifying issues that will require immediate attention within the next 60-180 days

2) Relationships: Allowing new members and chance to understand current team norms for working together and get their questions about the team answered.

Agenda

- Plan on 3-4 hours of time when the entire team can be present. The meeting must be posted and conducted in accordance with the Texas Open Meetings Act.

- Explain the nature of a transition meeting using the purpose statements above.

1) Identify critical issues

- Identify Critical Issues (not solutions) for both the district and the leadership team.

- A Critical Issue (CI) is a situation that is serious enough that we must address it within the next 60-180 days or we may not be able to get our job done.

- An example of a CI for the district might be “complete the hiring of all staff by next month”.

- An example of a CI for the leadership team might be “determine how this team plans to attend the TASB/TASA convention in October.” This does not impact on the district but is an important issue for the team.
Transition Meeting Outline (continued)

2) Discuss expectations and working relationships

- Listed below are some general questions that are issues for teams with new members.
  - What are our individual expectations for working together?
  - How do we as a team maintain effective communications?
  - How do we conduct our meetings?
  - How do we get items of interest on the meeting agenda?
  - What do we, as a team, consider serious situations that we all need to be informed about? How will that informing occur and by whom?
  - What are some concerns regarding our working relationship?
  - What other important issues need to be addressed?
- Ask all team members to address each question. Record their responses on an easel or notepaper so the main points can be summarized.
- Deal with as many questions as time permits or until the team finishes the list.

3) Summarize

- Review the team products developed during the session and summarize any agreements made.
- Ask for questions or clarify any remaining issues.
- It may be appropriate to ask the team to identify what next steps they desire to take.
- The notes should be typed (summarized) and provided to all participants.
Topics to Consider for a Local Orientation

Relationship issues

- Time demands and other commitments expected from board members
- Changes in the way staff and community members perceive the board member and challenges that can present
- Team operating procedures for areas such as:
  - Meetings
  - Asking for information
  - Communicating with team members
  - Communicating with the public and media
  - Speaking for the board
  - Bringing business before the board

Task issues

- District overview, including enrollment, demographics, performance, and recent trends
- District vision, mission, goals, plans
- District planning and evaluation process and calendar
- District budget summary, and recent trends in revenue, appropriations, tax rates, property values, development process and calendar
- Policy development and review process and location of manuals
- Personnel hiring practices and salary schedule
- Administrative structure and names of key personnel
- Overview of district curriculum objectives, standards, and instructional programs
Resources for New Team Members

Information for new board members

- A New Board Member’s Resource Guide, TASB Leadership Team Services (LTS); mailed free to new board members
- Getting Started as a New Board Member, TASB LTS
- A New Board Member’s Guide to Superintendent Evaluation, TASB LTS
- New Board Member Legal Package, TASB Legal Services
- A School Official’s Guide to the Texas Open Meetings Act, TASB Legal Services
- TASB’s Web site: www.tasb.org
- TASB resource links for new board members: www.tasb.org/welcome

To order TASB resources call 1-800-580-8272, extension 2290, or order online at www.tasb.org/tasb_store

For a complete list of publications available from NSBA, visit www.nsba.org

Training for new board members

- TASB Institute for School Trustee Development (TASB ISD), a guided curriculum for first year school trustees (See www.tasb.org/tasbisd)
- TASB conferences such as Summer Leadership Institute, Summer Governance Seminar, TASB/TASA Joint Annual Convention, Winter Governance Seminar, and regional Legal Seminars (See www.tasb.org/training)
- TASB Online Learning Center courses, including “Now Serving,” “TASB ISD Level One Certification,” and “Introduction to Parliamentary Procedures for School Boards.” (See www.tasb.org/onlinelearning)
- Formal board training from regional Education Service Centers, local colleges or universities, and education consultants
- Local area school board associations (See http://www.tasb.org/about/related/area.aspx)