

New Board Member Preparation Checklist

Setting Goals and Priorities and Monitoring Success

- Find out your district's process and calendar for setting goals and priorities and assessing success.
- Have your superintendent brief you on the state accountability system and the AEIS. Ask your superintendent for a copy of your district's most recent annual performance report if you don't already have one.
- Get a copy of your current district goals and review them.
- Find out how success on your district's current goals is going to be assessed.
- Keep a copy of your district goals with you at board meetings.

Adopting Policies

- Have a look at a copy of your district's policy manual.
- Have your board president or one of your colleagues give you a brief introduction in how to use the policy manual.
- Ask about your local procedures for adopting and revising policy.
- Read through and make sure you are familiar with both the legal and local versions of key policies you will need every day, such as:
 - Policy DGBA—Employee Complaints
 - Policy FNG—Student Complaints
 - Policy GF—Public Complaints
 - Read all the policies that govern the conduct of board business, such as:
 - Policy BAA—Board Powers and Duties
 - Policy BBE—Board Member Authority
 - Policy BBFA—Board Member Ethics: Conflict of Interest
 - Policy BE—Board Meetings
 - Policy BJ—Superintendent Employment

Hiring and Evaluating the Superintendent

- Find out your board's evaluation cycle and what step in the process will be coming up next.
- Get a copy of the evaluation instrument your board will use and review it right away.
- Find out what procedure, if any, your board has established for you to ask questions about performance between the evaluation conferences.

Adopting a Budget and Setting a Tax Rate

- Ask your board president to give you a brief “guided tour” of the current year's budget.
- Get a copy of your district's budget calendar.
- Get copies of any materials your board may have developed or may have received from staff that are relevant to the budget that is being prepared.

Communicating with the Community

- Find out what your board and district routinely do to keep the public fully and accurately informed.
- Find out who serves as the designated spokesperson for your board.
- Talk with your colleagues about the best way to respond to patrons and to the press when you're on the losing side of a close and carefully watched vote.
- Find out what formal means your board uses to hear from your community.

Board Operations--Meetings

- Find out who prepares the agendas for your board meetings and how you get an item included.
- Find out when you can expect to get agenda materials from your superintendent and what you do if you need additional information.
- Ask your board president what rules of order are used at your meetings.
- Make sure you understand the basic provisions of the Texas Open Meetings Act.
- Make sure you understand the limitations on closed sessions of your board.
- Study policy BEC—Closed Meetings.

Board Operations--Board Members and District Patrons

- Talk with your colleagues about how they respond in controversial situations.
- Learn your district's policies and procedures for handling patron complaints, including
 - Policy FNG—Student Complaints
 - Policy GF—Public Complaints

Board Operations--Board Members and the District Staff

- Ask your superintendent to brief you about district hiring processes, especially about how community-sensitive positions, such as principalships and head coaching jobs, are filled.
- Talk with your colleagues and your superintendent about when it is appropriate for board members to raise concerns about district staff and what is the appropriate manner for raising those concerns.
- Be sure you are familiar with board policies and procedures for asking information of staff.
- Study policy BBE—Board Member Authority.
- Make sure you know your district's policy for hearing complaints from staff.
- Find out your board's policy and procedures for board member visits to campuses and be very careful to adhere to them.