



Building the foundation

Developing better trustees 'from the ground up'

by David Koempel

Every year in Texas between 900 and 1,500 new school board members are elected or appointed to serve their local districts. Often these people begin their tenure on the board with an incomplete understanding of a board member's proper role and responsibilities.

Problems can arise when new trustees don't fully grasp their role. These problems can include misunderstanding the board's role with regard to district staff, not understanding all aspects of some of the issues facing the board, making inappropriate promises, or focusing on single issues.

These problems are usually unintentional and are merely a lack of information. One of the keys to minimizing, if not eliminating, the problems mentioned above is to offer local candidate orientation sessions for interested board candidates and community members. Many districts across the state have found such workshops to be invaluable to the board, district, and community.

Orientation benefits.

John Dawson, Tatum ISD Board vice-president, said he believes that candidate orientations are important because they "help new members from

getting into situations that they don't want to get in."

Orientation sessions also give potential candidates an opportunity to understand the commitment they are making. Katherine Persson, board president of Splendora ISD, suggests that board service is misunderstood by some community members. "Being a board member is a much larger focus than many people realize. There is a high level of commitment needed to serve effectively."

There are many reasons to consider offering a school board candidate orientation in your district. The benefits are more attractive when one realizes that these sessions are easy and inexpensive to conduct.

Candidate orientations are a good vehicle to educate the entire community, not just potential school board candidates, about the purpose and function of the local school board.

Often a greater appreciation occurs as people begin to realize the actual responsibilities of the board.

"It's very important for new candidates to attend orientation sessions," said Pete Francis, Andrews ISD Board president. "Orientations will

give [candidates] some insight of what to expect as a trustee."

In addition, orientation sessions are a good occasion to provide candidates with information about local issues. Often candidates get briefed by superintendents to receive information about issues facing the local board. This information gives candidates a clearer idea of the types of matters they will face if elected to the board. Since decision making is an important job of the school board, information can make that task easier. When successful candidates are informed early on, they can become more effective as new trustees sooner than those who aren't knowledgeable about such matters.

Informing single-issue candidates.

One important reason to offer candidate orientations is to inform those who might run with a single issue in mind. Many times people decide to run for the board for a specific reason. These reasons may include disappointment with a staff member, frustration with a district policy, or desire to change the way the district spends money.

While these are certainly issues the board may face, they

Advocacy: The board promotes the vision. The board promotes school board service as a meaningful way to make long-term contributions to the local community and society.

—*Framework for School Board Development*

Texas Administrative Code, §61.1 (b)

"(1) (A) All new board members shall participate in a local district orientation session within 60 days before or after their election or appointment. The purpose of the local orientation is to familiarize new board members with local board policies and procedures and district goals and priorities."

are not the single focus of the board. Single-issue candidates can come to realize at orientation sessions that the board must address a multitude of issues. This realization helps them expand their thinking on the issues.

“Candidates with a single issue need to remember that board members only have one vote,” notes Francis. “Being on a board requires working with other trustees and the superintendent.”

It is valuable to the candidate and the district to have a clear understanding that the board focuses on a variety of issues.

In addition to current board members and the superintendent, some of the resources that districts have locally to present orientations include former board members, staff, and board members or superintendents from neighboring districts.

Old hands reaching out to new.

Finally, by holding candidate orientation sessions, the district allows current trustees a chance to meet candidates

they may be working with in the future. Furthermore, trustees often refine their sense of their role as they help inform others about the board.

Often districts holding candidate orientations only allow current trustees not up for reelection to participate. This is done to minimize conflict of interest or “politicalization” of the session.

However, some boards, such as Splendora ISD’s, allow full participation in the orientation session. Splendora ISD holds its orientations before the filing deadline to minimize any problems, according to Persson.

Persson said that the sessions are beneficial to current trustees, too. “Getting a different perspective from board members on things like personal issues really helps,” she said.

Persson says the sessions “reinforce that it is important to behave in an ethical manner and that procedures like chain of command are important things that we do.”

Tips for local orientations.

Holding successful local candidate orientations requires preparation and coordination among those conducting the training.

“Have everything planned out before the workshop but allow some time for question-and-answer sessions,” says Persson.

There are a few things that you can do to make the planning of a candidate orientation session easier.

The superintendent and current board should decide on the purpose and focus of their local orientation. They also need to decide how they would like to conduct the orientation. An orientation can be a one-on-one meeting between the superintendent and each candidate, or it can be a multi-evening program involving

Governance Guides

HOLDING CANDIDATE ORIENTATIONS

WHAT TO CONSIDER:

- Consider the political climate of your district in deciding whether to hold an orientation before or after the filing period.
- Be sensitive to perceptions when deciding how incumbents running for reelection will participate in orientation sessions.
- Select a time and location convenient to the community.
- Publicize the event through local media, fliers in schools and community locations, and written or personal invitations to candidates or key community leaders.

WHAT TO INCLUDE:

- Explain the purpose and function of the school board.
- Describe the board’s and superintendent’s roles.
- Discuss local procedures for handling challenging issues.
- Share the district’s vision, mission, and current goals.
- Introduce current issues under consideration by the board.
- Include information about qualifications needed, filing and reporting requirements, and campaign ethics.
- Emphasize the variety of issues the board considers and the time commitment required by board members.
- Plan your program in advance and prepare helpful handouts.
- Be sure to allow time for questions and answers.

WHERE TO GET HELP:

- Include the full board in determining the purpose, focus, and structure of your candidate orientation.
- Include current or former board members, key district staff, or leaders from neighboring school districts as presenters.
- Find publicity tips and handout and transparency masters in TASB’s *Call to Service* candidate orientation kit.
- Use TASB’s *Guide for School Board Candidates* as a reference or present a copy to each participant.

presentations by several people.

In addition to current board members and the superintendent, some of the resources that districts have locally to present orientations include former board members, staff, and board members or superintendents from neighboring districts.

The next step in setting up a candidate orientation session is to select a time and location for the workshop. Weekday evenings are usually the best

time to hold these sessions.

You’ll want to select a time that doesn’t conflict with too many school- and community-related events. District facilities used most for orientation sessions include local campuses and administration offices. Other possible venues for sessions include a local business meeting room, local church, and service organization meeting space.

Once you’ve decided on a time and location for the orientation session, you’ll want

to publicize the event. If you want to invite only the candidates who have actually filed, you can call them and send a letter with the information about the session.

Many districts choose to open up their orientation sessions to all potential candidates and interested community members. To do this, you might want to develop a press release to share with your local media. Simple fliers hung in prominent places on your campuses and throughout your community are a good way to inform community members of an upcoming candidate orientation session. Word of mouth and personal invitations by current trustees are the most effective way to inform participants of an upcoming workshop.

Topics to cover.

During the candidate orientation workshop, you'll want to cover a variety of topics. Topics most appropriate for these sessions include the roles of the school board and superintendent, candidate qualifications, information about cam-

paingning, a brief overview of local mission and district goals, a summary of some of the issues the board has addressed, a list of and introduction to "key" local district staff members, and an introduction to the procedure trustees use for handling challenging issues.

The discussion of the board's and superintendent's roles is critical in a candidate orientation session, according to Tatum ISD's Dawson. "All the topics covered are good, but the roles are the most important. In fact, most of the other topics lead back to the roles."

A good foundation.

With the many challenges facing school districts today, it is important to help new school board members to become effective as they begin their service. One way to do this is to offer informative school board candidate orientations to help develop solid trustees from the ground up.★

David Koempel is a consultant with TASB's Leadership Team Services Division.

TASB can provide assistance

TASB has developed two products that can help local districts in providing potential candidates with an orientation to board service. *A Call to Service Workshop Package* is a video-based training package designed to get a local orientation session off to a good start. The publication entitled *Guide for School Board Candidates* contains valuable information for candidates on the election process and serving on the local board. For information on these products, contact Diane Aldridge at 800-580-8272 toll-free.

In addition, **area candidate orientations** are offered throughout the state. The workshops are open to all school board candidates, interested community members, and current school board members. Candidate orientations are offered by TASB in many locations and by the state's regional education service centers (ESCs) in others. For more information about area candidate orientations, call David Koempel at TASB, 512-467-0222 or 800-580-8272, extension 6191, or contact your local ESC.★