

# 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](http://www.tasb.org)
- TASB resource links for new board members: [www.tasb.org/welcome](http://www.tasb.org/welcome)
- *Becoming a Better Board Member, A Guide to Effective School Board Service*, National School Boards Association, 1680 Duke Street, Alexandria, VA 22314-3493, 703-838-NSBA. To order call 800-706-6722.

To order TASB resources call 1-800-580-8272, extension 2290, or order on line at [www.tasb.org/tasb\\_store](http://www.tasb.org/tasb_store)

For a complete list of publications available from NSBA, visit [www.nsba.org](http://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](http://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](http://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](http://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>)