

New Trustee Checklist

LEGAL REQUIREMENTS FOR THE FIRST YEAR

As soon as feasible before election

Receive certificate of election prepared by presiding officer in compliance with Texas Election Code section 67.016. *See TASB policy BBBB(LEGAL).*



Policies adopted by school boards are organized by topic into policy manuals maintained by the school district. Your local policy manual contains TASB's (LEGAL) reference policies and board-adopted (LOCAL) policies. Find out more about policies at tasb.org/services/policy-service/resources.aspx.

Read and sign Statement of Elected Officer and take oath of office. Tex. Const. art. XVI, section 1. *See TASB policy BBBB(LEGAL).*

First week

File conflict of interest disclosure forms as applicable.

These requirements are ongoing and apply to all school officials as defined by state law and district policy.

- You need to file Form CIS (available on the Texas Ethics Commission Website at ethics.state.tx.us/data/forms/conflict/CIS.pdf) with the district records administrator (often the superintendent's secretary) if any of the following apply: within the last year, you or your first-degree family member have received taxable income of more than \$2,500, or gift(s) with a value of more than \$100, from a school district vendor; or you have a family relationship within the third degree of relation to a school district vendor. *See TASB policies BBFA(LEGAL), (LOCAL).*
- If you own, or are a representative of, an entity that does business with the district, you must also complete and file with the district records administrator the vendor's questionnaire form CIQ (available on the Texas Ethics Commission Website at ethics.state.tx.us/data/forms/conflict/CIQ.pdf). *See TASB policy CHE(LEGAL).*

- Other disclosures may be required of trustees in your district by state law or local policy. *See TASB model policy BBFA(LOCAL).* If you are not sure what laws apply to your district, contact an attorney.

First two weeks

If desired, complete the form to withhold personal information, such as your home address, phone number, emergency contact information, and family information, from the district's response to a request for public information. *See TASB policy GBA(LEGAL).*

Receive introduction to TASB resources and set up your myTASB password at my.tasb.org.



Access TASB guidance specific to new board members at Leadership Team Services' New Board Members web page (tasb.org/new-board-member).

First 90 days

Attend one to two hours of Open Meetings Act training. Tex. Gov't Code § 551.005. *See TASB policy BBD (LEGAL).*

Attend one to two hours of Public Information Act training if required by local policy. Board member training on the Public Information Act is recommended but not required if the district has delegated responsibility for the training to the superintendent or other administrator in policy BBD(LOCAL). Tex. Gov't Code § 552.012. *See TASB policy BBD(LEGAL), (LOCAL).*



TASB Legal Services has online resources about the Texas Open Meetings Act at schoollawsource.tasb.org. The Texas Attorney General offers free online training at texasattorneygeneral.gov.



First 120 days

If you have not already attended a local orientation, receive orientation to local district policies and procedures, including, but not limited to, an introduction to the following:

- Current school board policy manual and any operating procedures
- Policies governing board meetings and trustee responsibilities in policy manual Section B on Governance
- District goals and priorities
- District's budget calendar and process for board adoption of budget and tax rate
- Superintendent evaluation instrument and process

Attend three-hour orientation on the Texas Education Code delivered by regional education service center.

Attend three-hour session on evaluating student academic performance from regional education service center or authorized provider.

Attend one-hour training on identifying and reporting potential victims of sexual abuse, human trafficking, and other maltreatment of children.

See *TASB Policy BBD(LEGAL)*.

First year

Participate in team-building session and assessment of continuing education needs with district board of trustees and superintendent.

Attend at least 10 hours of additional continuing education, based on assessed needs and state-adopted Framework for School Board Development.

Attend annual cybersecurity training in accordance with with the Texas Department of Information Resources guidelines. See TASB Policy CQB(LEGAL) and DIR Certified Cybersecurity Training.

See *TASB Policy BBD(LEGAL)*.



You can find more information about school board trustee training requirements, including a list of approved training providers, on the Texas Education Agency Website at tea.texas.gov/Texas_schools/school_boards/school_board_member_training.



For more information on board training and other legal requirements, visit TASB School Law eSource (schollawesource.tasb.org).

Additional Resources

Board development, training, and events

TASB Leadership Team Services ([LTS.tasb.org](https://lts.tasb.org), 800.580.8272)

Legal issues and training

TASB Legal Services' Legal Line (800.580.5345), legal.tasb.org, and TASB School Law eSource (schollawesource.tasb.org)

TASB Member Center

tasb.org/trustees

myTASB login

my.tasb.org, 800.580.8272

Policy

TASB Policy Service (policy.tasb.org, 800.580.7529)

Continuing education credit

TASB Leadership Team Services (cec.tasb.org, 800.580.8272)

TASB publications

store.tasb.org

TASB Website

tasb.org



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