



New Board Member Orientation and On-Boarding

A PURPOSEFUL ORIENTATION

This guideline is designed to support a local orientation process that will help new board members learn about the routine protocols and practice of the board, review key documents, district data, and engage in discussion with the superintendent and other board members to better understand district priorities.

The Association encourages the board and superintendent to:

- Schedule the orientation in manageable sessions. Our guide outlines two meetings, but you can break it down further. Consider that will work best and design a schedule that may include multiple meetings prior to the first regular board meeting.
- Identify key participants. Consider including all board members as the information presented can benefit all as a reminder. A collective setting also engages everyone in positive discussion and builds the foundation of a new board. NASB also recommends that the superintendent be involved in all discussions in order to build a strong relationship and communication support for new board members.
- Relate all the materials and discussions to the work you do as a board. Drawing a connection helps to create a relative and purposeful discussion. Frame the presentation and discussion around this question: “why is this information important for board members to learn and how does it aid in board decision-making?”
- Assign topics and responsibilities to various people to support an effective orientation process. Orientation materials may be presented by the superintendent, district administrators, the board president and/or experienced board members.

Whatever methods you use, be sure to adapt the process to meet your own goals for the orientation.

Questions, need help?

For further assistance, contact the Board Leadership team at (800) 422-4572 or email:

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NEW BOARD MEMBER ORIENTATION

COMMUNICATION

Leaders: Superintendent and Board President

- Initiate communication between the superintendent, the current board president, and the newly elected/appointed board member.
- Contact the individual to welcome them to the board and express appreciation for their interest in serving public education.
- Invite the new board member to the district office to meet staff and tour the district facilities.
- Establish dates and times to conduct the new board member orientation.

CONTACT THE ASSOCIATION

Leaders: Superintendent or Administrative Assistant

- Notify NASB or update the NASB Membership Portal with the new board member's name and contact information
- Register the new board member for the next NASB New Board Member Workshop
- Register the new board member for State Conference (reduced rate for newly elected board members)
- Review the NASB learning opportunities with your new board member and emphasize the importance of professional development.

PREPARE FOR ORIENTATION SESSION 1: BOARD OPERATIONS (STANDARD VII)

Leaders: Superintendent and Board President

- Board mission/vision/belief statements
- Board Code of Conduct
- Chain of Command, including explanation of authority and responsibilities of the board, superintendent, administrators, and individual board members
- Conflict of Interest Form
- NASB Board Governance Standards
- NASB Annual Board Calendar

- Board policy manual (or access to the online version), administrative guidelines, and district handbooks (e.g., student, staff, activities, etc.)
- Board committee structure and appointments
- Access to minutes from the past year board meetings and workshops
- Board meeting procedures, agenda preparation, and policy development
- Board members', superintendents', and administrative assistants' contact information
- Contact information about their board mentor (a current board member will be assigned as a mentor to respond to questions about board processes, etc.)

HOST ORIENTATION SESSION 1: BOARD OPERATIONS (STANDARD VII)

Participants: Newly elected/appointed board member, superintendent, board president, other board members

- District Mission/Vision
- Board Code of Conduct
- Chain of Command Policy
- Nebraska Open Meetings Law
- Conflict of Interest Form
- Review the NASB Board Governance Standards
- Review the following:
 - Placing items on the agenda
 - Questions regarding agenda items
 - Committee structure
 - Communicating with superintendent, board members, staff, the public, and the media
 - Responding to complaints
 - Conducting closed sessions
 - Participation during public forums
 - Visiting district buildings
 - Geographic boundaries of the district

QUESTIONS TO CONSIDER

- How do the mission, vision, and beliefs and/or philosophy statement impact the board's decision-making?

- How do committees report back to the board and why is this structure an asset to board decision-making?
- What practices help to ensure a productive relationship between the board and superintendent?
- What is the NASB Annual Board Calendar and how does the board use the calendar?
- What are communication agreements regarding emails with/between board members and superintendent, as well as media?
- What authority and responsibilities do board members possess?
- How does the Chain of Command impact board members? How can board members help to ensure it is followed?
- What practices does the board use to ensure effective meetings?
- How is the agenda created?
- How can an individual board member place an item on the agenda?
- Who and when should board members contact regarding questions about agenda items or the need for more background information?
- Where do I locate policies? What is the policy review process?

Discuss the fundamental board processes questions:

- What is the primary function of the board?
- To whom is the board accountable? How do we exercise/ensure accountability?
- How do the board's responsibilities differ from the superintendent's?
- How does the board ensure an effective and responsible working relationship with the superintendent?
- Where does a board member go for information?
- What are the elements of an effective board meeting? How can we ensure the board conducts effective meetings?
- Can board members meet socially without violating the Open Meetings Law?
- Is it okay for board members to talk about board business outside of the boardroom? What can a board member say, or not say to parents, friends, and family regarding board issues?
- How does a board member address concerns for their children with a teacher once they are elected to serve the district?
- How does a board member support what they think is a bad decision?
- Who is responsible for the board's work and behavior?
- What opportunities are available to the board to grow professionally as a board member?

PREPARE FOR ORIENTATION SESSION 2: DISTRICT RESOURCES (STANDARD VI)

Leaders: Superintendent and Board President

- Current district budget summary
- Current assessed valuation and tax structure of the district
- Funding/budgeting process for the school district
- Data to address current existing bond indebtedness of the district and when building debts will expire
- Information regarding federal aid to the school district
- Explanation of how the tax rate is determined

HOST ORIENTATION SESSION 2: DISTRICT RESOURCES (STANDARD VI)

Participants: Newly elected/appointed board member, superintendent, board president, other board members

QUESTIONS TO CONSIDER

- What are the taxing funds of the district and are their restrictions on use of funds?
- What are the statutory levy limits for each fund?
- How do bond and special building fund levies differ from the general fund levy?
- How dependent is the district on property tax versus state aid?
- What proportion of valuation is residential, agricultural, commercial, or other classifications?
- What is the district's current total assessed valuation, and how has it trended over the past five years?
- What percentage of the general fund budget is allocated to instruction versus support services and operations?
- What are the primary cost drivers in this year's budget?
- What assumptions were used in revenue projections (enrollment, state aid, valuation growth)?
- What is the annual budget calendar, and where does the board provide input?
- How does the district align the budget with strategic plan priorities?
- How are district needs incorporated into multi-year financial planning?
- How does the district monitor budget performance throughout the year?
- Discuss the fundamental board processes questions:

- When and how does the board evaluate the superintendent?
- How is the superintendent and district staff accountable to the board? How does the board assure this accountability?
- What are the top three financial risks facing the district in the next 3-5 years?

PREPARE FOR ORIENTATION SESSION 3:

DISTRICT RESOURCES (STANDARD VI)

- Short- and long-range facility plans
- List of all district facilities and/or properties, location, and condition
- Overview of construction projects contemplated and in progress
- Overview of the district's building maintenance program
- Overview of the student transportation system
- Tour of district facilities
- Student enrollment, recent trends, and option enrollment
- Current staffing needs and projections
- District salary schedules and benefits program and current salary data for certificated staff and administration

HOST ORIENTATION SESSION 3:

DISTRICT RESOURCES (STANDARD VI)

Participants: Newly elected/appointed board member, superintendent, board president, other board members

QUESTIONS TO CONSIDER

- What is the district's current 5-, 10-, and 20-year facilities outlook?
- How are facility plans aligned with enrollment projections and program expansion?
- How often is the long-range plan updated, and what role does the board play in revisions?
- What major capital systems (HVAC, roofing, electrical) are nearing end of life?
- What projects are currently underway and are they on schedule?
- What community engagement occurred prior to project approval?
- What projects are under consideration but not yet approved?
- How many bus routes operate daily?
- What is the age of the bus fleet and is there a replacement schedule?
- What are the enrollment trends of the district?

- What is net gain/loss from option enrollment?
- Are demographic changes influencing program needs?
- What are current staffing shortages?
- What are projected retirements over the next five years?
- What is the district's student-to-teacher ratio?
- What succession planning exists for leadership roles?
- What percentage of the general fund budget is allocated to salaries and benefits?
- How have negotiated settlements trended in recent years?
- How does the district's salary schedule compare to peer districts?
- How does the district's negotiated agreement compare to peer districts?
- How are administrative salaries determined and evaluated for competitiveness?

PREPARE FOR ORIENTATION WORK SESSION 4:

ACCOUNTABILITY & STUDENT SUCCESS (STANDARD IV)

- District short and long-range goals, including the district strategic plan
- Superintendent's contract, evaluation tool, job description, salary and benefit package details
- District's evaluation criteria and procedures for administrators, certificated, and classified staff
- District's professional development program and/or schedule for administration, certificated, and classified staff
- Contracts including administrators, collective bargaining agreements between the board and certificated staff, other recognized bargaining units
- District grievance procedures (i.e., public, staff, student, etc.)
- District's overall curriculum program, standards, assessments, and graduation requirements
- Recent reports on strategies, interventions, or initiatives to grow and improve learning
- Student success data
- Climate surveys, feasibility studies, etc.

HOST ORIENTATION SESSION 4:

ACCOUNTABILITY & STUDENT SUCCESS (STANDARD IV)

Participants: Newly elected/appointed board member, superintendent, board president, other board members

QUESTIONS TO CONSIDER

- What is the district's direction, focus, vision, mission, core values, and beliefs?
- How is the district moving forward on their goals, strategic plan, and other areas of focus?
- What is the board's role in reaching district goals and achieving the strategic plan?
- How do we measure success as a board?
- How frequently does the board monitor progress?
- When is the next formal review or revision cycle?
- How does the strategic plan support the school improvement process of NDE?
- How is the superintendent's evaluation aligned with the district strategic goals?
- What evidence is used to assess superintendent performance?
- How does compensation compare to similarly sized districts?
- What evaluation frameworks are used for each employee group?
- How are underperforming staff supported?
- How are PD topics aligned with strategic goals and student data?
- How does the district support leadership development and succession planning?
- What bargaining units are recognized by the board?
- What flexibility does the district have in staffing assignments?
- What financial modeling is used during negotiations?
- What formal grievance pathways exist (staff, students, parents)?
- What curriculum review cycle is in place?
- How are state standards integrated into district curriculum?
- What local assessments supplement state assessments?
- How is curriculum alignment verified (horizontal, vertical, scope and sequence)?
- What board policies govern curriculum adoption?
- How does the district measure the effectiveness of instructional and program initiatives?
- How often are climate surveys administered? What themes have emerged from recent climate surveys?

PREPARE FOR ORIENTATION SESSION 5:

STAKEHOLDER & COMMUNITY ENGAGEMENT (STANDARD III)

- District Annual Report
- Current state school report card
- NDE District Profile
- School improvement or leadership teams

- Community demographics
- Population projections
- Partnerships with local businesses and organizations
- Internship, career pathway, or workforce initiatives
- Chain of Command (revisit)

HOST ORIENTATION SESSION 5:

STAKEHOLDER AND COMMUNITY ENGAGEMENT (STANDARD III)

Participants: Newly elected/appointed board member, superintendent, board president, other board members

QUESTIONS TO CONSIDER

- How does the district communicate the vision, and goals of the district to stakeholders?
- How does the district develop a shared vision and goals for the future of the district with stakeholders?
- Are there stakeholder groups currently underrepresented?
- How does stakeholder feedback influence board decisions?
- How does the board engage the community?
- What communication channels are used most effectively (website, social, media, newsletters, meetings)?
- What are the expectations for board members responding to community concerns?
- How are the district and community connected?
- How is the community changing demographically?
- Are there community needs that impact the school?
- How do demographic shifts affect enrollment or programming?
- What organizations are key partners with the district?
- How do partnerships support student opportunities?
- How should board members respond to concerns raised publicly?