

# Orientation: Building The Board Team



**VSBA**

**Virginia School Boards Association**

Leadership • Advocacy • Support



# ORIENTATION: BUILDING THE BOARD TEAM

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# ORIENTATION: BUILDING THE BOARD TEAM

## Overview

In order to become a high-performing team, each board must address the orientation needs of new board members and the development of the “new” team. The Virginia School Boards Association has developed these materials to help school boards orient newly elected or appointed board members to their position. Three agendas with accompanying materials and questions will help you work through this orientation process.

The first orientation step, which involves division documents and materials, should be conducted by the superintendent and board chair and does not necessarily have to occur at a regular meeting. The meeting will have to be posted and conducted as an open meeting.

The second step, a set of agendas involving conversations about division identity and processes, can be discussed during a regularly scheduled board meeting.

## The work

Every other year most school boards gain at least one new member, and some even acquire a new majority of new members. Whenever new members join the governance team, whether one or more board members or a new superintendent, it is valuable to go “back to the basics.”

Organizational theory confirms that all newly formed teams go through four “building” stages: getting to know each other, surfacing differences, learning to embrace differences and finally working as a high performing team. These four steps also have been called “forming, storming, norming and performing.” An effective orientation program for new board members can accelerate the time between the start and becoming that high-performing team.

Boards have the important task of developing policies and guidelines for their divisions that gives every student the tools and resources to learn and succeed in school. Being a good steward means avoiding the day to day minutia that falls below a Board’s governance line. A small amount of time invested in orientation and team building will allow the board to focus on its important work. Time invested is well worth the effort in terms of reduced stress on members, community confidence and the effectiveness of your school board. Some people use the helpful phrase “go slow to go fast.”

Each member of the board has the potential to make an important contribution. Every new board also has the potential to create a high performing team. To get to that destination of a high-performing board, the new board team has three areas that need to be addressed: providing new board members with the information they will need to do their job effectively, building the new team and pursuing professional development opportunities.

The three distinct tasks that have been identified are:

1. Nuts & Bolts — Orientation to the division and information about public education
2. Division Identity & Board Processes — Who we are and how we do things
3. Professional Development — VSBA workshops, reading

Many boards address one or two of these orientation tasks, but excellence likely requires all three. While there is no right or wrong order in the way to accomplish these tasks, giving new board members access to important documents that relate to their ability to understand the issues should be one of the first tasks.

# NUTS & BOLTS: ORIENTATION TO THE DIVISION AND PUBLIC EDUCATION

Board members must be properly and thoroughly informed about the school division they serve as well as the role and responsibilities of a board member. The information listed below will provide an excellent starting place for this task. Ideally, this information will be shared during a face-to-face meeting between the new board member(s) and the superintendent and board chair. Generally, the board chair assumes responsibility for orientation around board processes while the superintendent takes the lead on orientation to the division. This list is organized by location of the items.

## **Available from the local board governing documents, procedure and protocols:**

- Board mission/vision statements and division belief/vision statements
- Board processes, including expense reimbursement, types of board meetings, board meeting procedure, agenda preparation and policy development
- Communication protocol, including use of e-mail and communicating with media
- Code of Conduct for members of school boards and conflict of interest criteria
- School Division organizational chart

## **Available from the superintendent or local school division website:**

- Board meeting minutes and agendas
- Most recent Annual Financial Report, auditor's report, and other financial information
- Division Improvement Plans and School Improvement Plan(s)
- Important calendars, including regular board meeting and budget calendars
- Important handbooks, such as personnel and student handbooks
- Summary of pending litigation involving the division
- Special reports, including facilities assessments, curriculum studies, results of recent community surveys, enrollment trends, etc.
- School Board Norms or Operating Procedures

## **Available from the Virginia School Boards Association at [www.vsba.org](http://www.vsba.org):**

- What Every New School Board Member Needs To Know About Their School System handbook
- VSBA New Member Orientation training dates
- Legislative information, including how to contact legislators
- Free materials and resources at [http://www.vsba.org/resources/new\\_member\\_resources/](http://www.vsba.org/resources/new_member_resources/)

## **Available from the Virginia Department of Education at <http://www.doe.virginia.gov/>:**

- Information to assist and support the work of school divisions, policymakers and Virginia residents
- Information about the federal Elementary and Secondary Education Act (ESEA) and its implementation in Virginia

## **Available from the Virginia Department of Education at [http://www.doe.virginia.gov/statistics\\_reports/school\\_report\\_card/index.shtml](http://www.doe.virginia.gov/statistics_reports/school_report_card/index.shtml) :**

- Current School Report Cards
- School information searchable by school, division, city or county

**Available from the National School Boards Association (NSBA) at [www.nsba.org](http://www.nsba.org) :**

- Information about NSBA's Annual Conference & Exposition
- Public education news and issues
- Information about federal laws that affect your schools

**Available from The Center for Public Education at [www.centerforpubliceducation.org](http://www.centerforpubliceducation.org) :**

- Accurate, timely and credible information about public education
- Research, data, and analysis on current education issues

**Division Facilities:** In addition to sharing information, the superintendent and/or board chair should conduct a tour of division facilities for any new board member(s) who might desire it.

**Board Mentors:** The board also may want to offer a mentor relationship for a new board member with an existing board member. While this might not be necessary in all divisions, for some it might provide a way to offer continued guidance and a more comfortable way of asking questions about the division and its processes. VSBA also hosts a mentor program with school board members from across Virginia. Contact VSBA for additional information on this program.

## Sample Nuts & Bolts Agenda

### Orientation to the Division and Public Education

*Superintendent & Board Chair with new members*

	<b>Approximate time</b>
<b>Welcome to the School Board</b>	10 minutes
<i>a) Role of Board Policy</i>	
<i>b) Committees of the Board</i>	
<i>c) Conflict of interest, code of ethics</i>	
<b>Board/Superintendent Relationship</b>	20 minutes
<i>a) Goals, expectations, job description</i>	
<i>b) Responsibilities within and beyond the division</i>	
<i>c) Contract and evaluation process</i>	
<i>d) Communications, channel of communication</i>	
<b>School Finance</b>	20 minutes
<i>a) Budget and amended budgets</i>	
<i>b) Revenue and expenditures</i>	
<i>c) Accountability: monthly reports and yearly audit</i>	
<b>Instructional Program</b>	10 minutes
<i>a) Organization of attendance centers</i>	
<i>b) Regular, special, and support programs</i>	
<i>c) Student achievement, assessment, reporting</i>	
<i>d) Student handbook process</i>	
<i>e) Extra-curricular program and athletic code process</i>	
<b>Personnel</b>	10 minutes
<i>a) Staffing levels (teachers, staff, administration)</i>	
<b>School Community Relations</b>	10 minutes
<i>a) Relationships with the PTA, booster clubs, foundations</i>	
<i>b) Division memberships, cooperatives</i>	
<b>Important issues in the future</b>	5 minutes
<b>Assessment:</b> <i>What topics can we cover in more detail?</i>	
<i>What other issues can be added to future orientation meeting agendas?</i>	5 minutes
<b>Adjournment</b>	

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Total time = 90 minutes

# DIVISION IDENTITY & BOARD PROCESSES: BUILDING THE NEW SCHOOL BOARD TEAM

## Two conversations about the basics

Whenever new members join the governance team (one or more board members, or a new superintendent) it is valuable to go “back to the basics.” Two board conversations are called for: one involving division identity and the other involving board processes. In addition to having valuable conversations about the division, the meetings will allow members to get to know each other and hear the various perspectives around the table.

**Sample Meeting Agendas:** We have provided two draft agendas to help facilitate the board’s conversation around these two important topics. Many boards will want to schedule a special meeting for this work, which must be done in open session. Other boards might choose to take an hour or more at a regular meeting for these conversations.

The board might conduct these two conversations in whatever order it finds most compelling. Go with the board’s energy — which seems like the easier, or most pressing, conversation.

Included with each agenda you will find **Key Questions** that the new team will want to keep in mind as it begins the discussion. Additionally, you will want to provide any relevant **Supporting Documents**. Every board has existing documents that will support and inform these conversations. A list of suggested documents that would be helpful for each session is provided. Gather those which are available and helpful. Participants would likely benefit in thinking about these questions and reviewing the supporting documents prior to the discussion.

**Note:** Many boards can have a productive conversation without outside facilitation. However, some boards will find it helpful to have an objective facilitator for these conversations. If you are interested in having someone from VSBA facilitate the discussion, please contact the association.

## Conversation A: Division Identity

**Overarching questions:** *Who are we? What do we care about? What are we trying to do?*

How much time should be allocated to this conversation? One approach is to allocate 90 minutes and see how it goes, it may not take the full amount of time, or it could run over and the board may choose to return to the conversation on another occasion.

### **Key Identity Questions:**

1. What is our division's focus, goals, vision, mission, core values or beliefs?
2. Do we have a plan to move our division forward: Division goals? Strategic plan? Areas of focus?
3. How have we communicated our direction, plans, etc. to the division's stakeholders? Is there widely shared agreement regarding our vision and direction?
4. How does the board relate to the community? How are the division and community connected? How would we like to be connected?
5. How do the community, division and board communicate with one another?
6. What important events have happened in our division's recent (20 years) history?
7. How are we doing as a division? How do we know how we are doing? By what/whose criteria do we measure how we are doing?

### **Supporting Local Identity Documents:**

- Division Beliefs/Values
- Mission/Vision statements
- Areas of division focus
- Long-range goals
- Comprehensive Plan
- Annual goals/report on progress
- Superintendent performance-based contract goals
- School Improvement Plans
- Virginia State Report Cards
- Reports on recent projects and/or initiatives
- What else?

## Meeting Agenda A: Division Identity

	Approximate time
<b>Call to Order, roll call , your regular meeting start</b>	
<b>Sharing personal stories and “mental models”:</b> <i>Invite each person to share a moment in the division’s history that is personally seen as a turning point, identity moment, key event.</i>	30-45 minutes
<b>Review of existing documents:</b> <i>Ask continuing members to share how the various division identity documents (see list) came to be:</i> a) Date created b) Authors c) Use to this point	15 minutes
<b>Review Division Beliefs and/or Values:</b> <i>Invite members to share: Which do I personally find most compelling? Which are questions for me? On which do I wonder whether we have agreement? (If the division does not have a written list of beliefs, discuss the value of scheduling time to create a beginning list.)</i>	20 minutes
<b>Consider:</b> <i>What’s missing? Do we have basic agreements about our division’s identity that we have not written down? Should we? See Key Questions list.</i>	10 minutes
<b>Next steps:</b> <i>Are there any appropriate next steps this board is ready to agree on and schedule for a subsequent meeting?</i>	10 minutes
<b>Assessment:</b> <i>How did we do? What can be improved?</i>	5 minutes
<b>Adjournment</b>	

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Total time = 90-105 minutes

## Conversation B: Governance Team Process Basics

**Overarching questions:** *How does this team do business? What's expected around the table? Do we have agreement regarding our processes? Do we have a set of Board Norms?*

Again, the amount of time that you allot should be determined by your board and your conversation. You may wish to begin with 90 minutes or adjust the time to your individual division needs and schedules.

### Key Process Questions:

1. To whom is the board accountable? How do we exercise/assure our accountability?
2. What does the board understand its role/job to be?
3. What does the board understand the role/job of a board member to be?
4. What does the board understand the role/job of the superintendent to be?
5. How does the board nurture an effective and responsible relationship with the superintendent?
6. How are the superintendent and staff accountable to the board? How does the board assure this accountability?
7. Does the board delegate some responsibilities to the superintendent/staff? Why? What does good delegation look like?
8. Who is responsible for the board's work and behavior?
9. How are we doing as a board? How do we know how we are doing? By what/whose criteria do we measure how we are doing?
10. What does an efficient and effective school board meeting look like? How can we plan for good meetings?

### Supporting Documents:

- Board process policies or Board Norms
- Other existing documents recording board agreements
- Recent board self-evaluation reports
- What else?

## Meeting Agenda B: Governance Team Process Basics

	Approximate Time												
<b>Call to Order, roll call, your regular meeting start</b>													
<b>The Legacy of this Board:</b> <i>Invite each person to share an item they would like to be able to say about <u>this board</u> in two years.</i>	20 minutes												
<b>Review existing documents:</b> <i>Ask continuing members to share how the various division process documents (see list) came to be:</i> <ul style="list-style-type: none"> <li>a) Date created</li> <li>b) Authors</li> <li>c) Use to this point</li> </ul>	10 minutes												
<b>Board Norms:</b> <i>Do you have agreement on some common process questions?</i> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Placing items on the agenda</td> <td style="width: 50%;">Participating during public forums</td> </tr> <tr> <td>Asking agenda questions</td> <td>Communicating with members</td> </tr> <tr> <td>Communicating with staff</td> <td>Visiting campuses</td> </tr> <tr> <td>Responding to complaints</td> <td>Communicating with the media</td> </tr> <tr> <td>Communicating with the public</td> <td>Orienting new members</td> </tr> <tr> <td>Conducting closed sessions</td> <td></td> </tr> </table> <i>VSBA staff are prepared to offer best practice guidelines for boards desiring some help.</i>	Placing items on the agenda	Participating during public forums	Asking agenda questions	Communicating with members	Communicating with staff	Visiting campuses	Responding to complaints	Communicating with the media	Communicating with the public	Orienting new members	Conducting closed sessions		30 minutes
Placing items on the agenda	Participating during public forums												
Asking agenda questions	Communicating with members												
Communicating with staff	Visiting campuses												
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Communicating with the public	Orienting new members												
Conducting closed sessions													
<b>Consider:</b> <i>What's missing? Do we have basic agreements about our processes that we have not written down? Should we? See Key Questions list.</i>	15 minutes												
<b>Next steps:</b> <i>Are there any appropriate next steps this board is ready to agree on and schedule for a subsequent meeting?</i>	10 minutes												
<b>Assessment:</b> <i>How did we do? What can we improve for next time?</i>	5 minutes												
<b>Adjournment</b>													

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Total time = 90 minutes

# NEW BOARD MEMBER PROFESSIONAL DEVELOPMENT

Training is available through a number of opportunities with the Virginia School Boards Association. There are in-person conferences, local regional forms, online webinars available live or on demand, and much more to assist you with your training needs.

Dates and locations for the meetings and conferences are announced each December for the following year. Meeting pricing and registration information is emailed to each board member as they become available. Online brochures and registrations for these events can also be found on VSBA's website: [www.vsba.org](http://www.vsba.org).

## **Code of Virginia**

Title 22.1. Education » Chapter 13.2. Standards of Quality » § 22.1-253.13:5. Standard 5. Quality of classroom instruction and educational leadership

D. Each local school board shall require (i) its members to participate annually in high-quality professional development activities at the state, local, or national levels on governance, including, but not limited to, personnel policies and practices; the evaluation of personnel, curriculum, and instruction; use of data in planning and decision making; and current issues in education as part of their service on the local board and (ii) the division superintendent to participate annually in high-quality professional development activities at the local, state, or national levels, including the Standards of Quality, Board of Education regulations, and the Guidelines for Uniform Performance Standards and Evaluation Criteria for Teachers, Principals, and Superintendents.

**New Board Member Orientation:** The VSBA hosts a new board member orientation each January and July to orientate new board members on topics including school law, parliamentary procedure, roles and responsibilities, and more. Information about these sessions are posted on the VSBA website.

**Continue growing:** VSBA offers a wide array of personalized board development sessions including strategic planning, establishing board norms, facilitated board self-evaluation, and more. Visit [www.vsba.org](http://www.vsba.org) for more information.

**VSBA Annual Convention:** Each November (during the week prior to Thanksgiving), the Virginia School Boards Association hosts a state convention for public school leaders. This event features a wide array of breakout sessions, exhibits, workshops and general sessions. Information is updated continuously at [www.vsba.org](http://www.vsba.org).

**NSBA:** The National School Boards Association, of which VSBA is a member, is another important source for board member development and information. See [www.nsba.org](http://www.nsba.org).

# APPENDIX

## Exhibit A- Sample Board Policy for School Board Member In-Service Activities

File BHB

### SCHOOL BOARD MEMBER IN-SERVICE ACTIVITIES

The School Board places a high priority on the importance of a planned and continuing program of in-service education for its members. The central purpose of the program is to enhance the quality and effectiveness of public school governance in our community. The School Board shall plan specific in-service activities designed to assist School Board members in their efforts to improve their skills as members of a policy-making body; to expand their knowledge about trends, issues, and new ideas affecting the educational activities of the local schools; and, to deepen their insights into the nature of leadership in a modern democratic society.

School Board members will participate annually in high-quality professional development activities at the state, local or national levels on governance, including, but not limited to, personnel, policies and practices; the evaluation of personnel; curriculum and instruction; use of data in planning and decision making; and current issues in education.

Funds shall be budgeted annually to support this program. Individual School Board members shall be reimbursed for out-of-pocket costs incurred through participation in approved activities. The School Board shall retain the authority to approve or disapprove the participation of members in planned activities. The public shall be kept informed about the School Board's continuing in-service educational activities.

The School Board regards the following as the kinds of activities and services appropriate for implementing this policy:

1. Participation in school board conferences, workshops and conventions conducted by the Virginia and the National School Boards Association.
2. Division-sponsored training sessions for School Board members.
3. Subscriptions to publications addressed to the concerns of school board members.

Adopted:

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Legal Ref.: Code of Virginia, 1950, as amended, §§ 22.1-78, 22.1-253.13:5.

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SCHOOL DIVISION NAME

*This is a sample policy from VSBA Policy Services. If your division would like more information about VSBA Policy Services, please contact VSBA at 434-295-8722.*

## **Exhibit B- Guidelines for Serving as a Mentor to a New School Board Member**

*On Division letterhead*

Date

Dear School Board Member:

Congratulations on being asked to serve as a mentor to a new Board member. The goal of the mentoring program is to orient a new Board member to the Board and Division and to help him or her be comfortable, develop self-confidence, and become an effective leader. Follow these guidelines to maximize your mentoring effectiveness.

1. Be a good mentor by sharing your knowledge and experiences with others. Take a personal interest in helping others succeed.
2. Try to develop an informal, collegial relationship with the new Board member – explain that you are there to help. Listen respectfully to all concerns and answer questions honestly.
3. During your first contact with the new Board member, introduce yourself and explain that you will serve as his or her mentor and are looking forward to sharing information about the Board and Division. If possible, meet with the individual to become acquainted. Be available as needed to provide assistance, advice, and support. The Superintendent's office will have already provided the new Board member with a web link or paper copy of the Board's policies as well as other helpful material.
4. Be prepared to introduce the new Board member at upcoming Board events until he or she becomes a familiar face.
5. Be available and maintain a helpful attitude. You will assist the new Board member become an effective member of the Board and ensure skilled and knowledgeable future leadership for the Division.

Being a mentor can bring rewards to you, the new Board member, and the Division. Thank you for your assistance and commitment.

Sincerely,

School Board Chair

## **CONGRATULATIONS!**

If your school board/superintendent team has completed the work plan laid out in this publication and discussed and/or scheduled professional development opportunities, your division is well on its way to having a high-performing team.

If you have any questions about these materials, please contact VSBA staff by calling 1-800-446-8722. We look forward to seeing you soon.



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