



VSBA

Virginia School Boards Association

Leadership · Advocacy · Support

Conducting a Local Board Orientation



CONGRATULATIONS!

If your school governance team (school board and superintendent) has completed the work plan laid out in this publication and discussed and/or scheduled professional development, 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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Overview

To become a high-performing governance 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 at the local level. Three agendas with accompanying materials and questions will help you work through this orientation process.

The first orientation step, which involves understanding local school division documents and materials, should be conducted by the superintendent and board chair.

The second step is a set of agendas involving conversations around 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 majority of new members. Whenever new members or a new superintendent join the governance team, it is valuable to go “back to the basics,” because you now have a new governance team.

Organizational theory confirms that all newly formed teams go through four “building” stages: getting to know each other, identifying 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 a high performing team.

Boards have the important task of developing policies and guidelines for their divisions that give every student the tools and resources to learn and succeed in school. Being a good steward means avoiding the day-to-day details that fall below the 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 governance 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 school division and information about public education.
2. Division Identity & Board Processes — Who we are and how we do things.
3. Professional Development — Professional development 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 school division. The below 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.
- School Division organizational chart.
- School Board Norms or Operating Procedures.
- School Board Goals.

Available from the superintendent or local school division website:

- School Division's strategic plan.
- 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 meetings and budget calendars.
- Important handbooks, such as personnel and student handbooks.
- Special reports, including facilities assessments, curriculum studies, results of recent community surveys, enrollment trends, etc.

Available from the Virginia School Boards Association at 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.
- Mentor Program for new school board members.
- Free materials and resources at 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 <https://schoolquality.virginia.gov/>: Virginia School Quality Profiles

- School information searchable by school, school division, city or county.

Available from the Consortium of State School Boards Association (COSSBA)* at <https://www.cossba.org/> :

- Information about COSSBA's Annual Conference and other resources.

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.

***About COSSBA:** COSSBA is a non-partisan, national alliance dedicated to sharing resources and information to support, promote and strengthen state school boards associations. COSSBA is dedicated to ensuring public school board leaders obtain high quality training and support in order to provide excellent and equitable public education in local communities throughout the Nation.

Sample Agenda

Orientation to the Division and Public Education

Superintendent & Board Chair with new members

	Approximate time
Welcome to the School Board	10 minutes
<i>a. School Board Norms and Protocols</i>	
<i>b. Committees of the Board</i>	
<i>c. Code of conduct</i>	
Board/Superintendent Relationship	20 minutes
<i>a. Goals and expectations</i>	
<i>b. Responsibilities within and beyond the division</i>	
<i>c. Contract and evaluation process</i>	
<i>d. Communications, channel of communication</i>	
School Finance	20 minutes
<i>a. Budget and amended budgets</i>	
<i>b. Revenue and expenditures</i>	
<i>c. Accountability: monthly reports and yearly audit</i>	
Instructional Program	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</i>	
Personnel	10 minutes
<i>a. Staffing levels (teachers, staff, administration)</i>	
School Community Relations	10 minutes
<i>a. Relationships with the PTO/PTA, booster clubs, foundations</i>	
<i>b. Division memberships, cooperatives</i>	
Important issues in the future	5 minutes
Assessment: <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
Adjournment	

Total time = 90 minutes

Division Identity & Board Process: 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 suggested: 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. Participants would likely benefit from 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?*

Key Identity Questions:

1. What are 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 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
Call to Order, roll call, your regular meeting start	
Sharing personal stories and “mental models”: <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
Review of existing documents: <i>Ask continuing members to share how the various division documents (page 9) came to be:</i> <ul style="list-style-type: none">a. Date createdb. Authorsc. Use to this point	15 minutes
Review Division Beliefs and/or Values: <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
Consider: <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
Next Steps: <i>Are there any appropriate next steps this board is ready to agree on and schedule for a subsequent meeting?</i>	10 minutes
Assessment: <i>How did we do? What can be improved?</i>	5 minutes

Adjournment

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 an agreement regarding our processes? Do we have a set of Board Norms and Protocols?*

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?

Division Process Documents

- Board Norms and Protocols
- Other existing documents recording board agreements
- Recent board self-evaluation reports
- What else?

Meeting Agenda B: Governance Team Process Basics

	Approximate time
Call to Order, roll call, your regular meeting start	
The Legacy of this Board: <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
Review existing documents: <i>Ask continuing members to share how the various division documents (page 11) came to be:</i> <ul style="list-style-type: none">a. <i>Date Created</i>b. <i>Authors</i>c. <i>Use to this point</i>	10 minutes
Board Norms: <i>Do you have agreement on some common process questions?</i>	30 minutes
Placing items on the agenda Asking agenda questions Communicating with staff Responding to complaints Communicating with the public Conducting closed sessions	Participating during public forums Communicating with members Visiting schools Communicating with the media Orienting new members
Consider: <i>What's missing? Do we have basic agreements about our process that we have not written down? Should we? See Key Questions list (page 11).</i>	15 minutes
Next Steps: <i>Are there any appropriate next steps this board is ready to agree on and schedule for a subsequent meeting?</i>	10 minutes
Assessment: <i>How did we do? What can we improve for next time?</i>	5 minutes
Adjournment	

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.

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 to orientate new board members on topics including school law, parliamentary procedure, roles and responsibilities, and more. Information about these sessions is posted on the VSBA website. This orientation is a high-level training meant to compliment a local orientation, not to take the place of.

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 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.

COSSBA: The Consortium of State School Boards Association, of which VSBA is a member, is another important source for board member development and information. See www.cossba.org/.

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

File BHB

SCHOOL BOARD MEMBER IN-SERVICE ACTIVITIES

Members of BLANK School Board participate annually in high-quality professional development activities at the state, local, or national levels on governance, including 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 Board.

Each elected board member completes a training session on the Virginia Freedom of Information Act (FOIA) provided by the Virginia Freedom of Information Advisory Council or the Board's attorney within two months of assuming office and thereafter at least once every two calendar years.¹

Each board member completes a training session for local elected officials on the State and Local Government Conflict of Interests Act (COIA) provided by the Virginia Conflict of Interest and Ethics Advisory Council (the Ethics Council) within two months of assuming office and thereafter at least once every two calendar years.

The school board clerk maintains records of the dates on which each school board member completed the required FOIA and COIA training sessions. The records are maintained in the clerk's office for five years.

Adopted:

Legal Ref.: Code of Virginia, 1950, as amended, §§ 2.2-3132, 2.2-3704.3, 22.1-78, 22.1-253.13:5.

Cross Ref.: BBFA Conflict of Interests and Disclosure of Economic Interests
BCC School Board Clerk

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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.

FOOTNOTES ARE FOR REFERENCE ONLY AND SHOULD BE REMOVED FROM FINAL POLICY.

¹ School boards which have no elected members should not adopt this paragraph.

Exhibit B- Sample 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



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Virginia School Boards Association

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