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## New Board Member Checklist



Sometimes, it's just helpful to know what questions to even ask. This checklist for new school board trustees has practical questions and tips that will help you focus on the big picture perspective of district affairs as you dig into the details of board service. Refer to this list throughout your first year and read our [guide for new school board members](#) to help you get grounded and going in your board service.

You'll also want to review the [legal requirements for new trustees](#).

### Setting goals and priorities and monitoring success

- Find out your district's process and calendar for setting goals and priorities and assessing success.
- Have your superintendent brief you on the state accountability system and the Texas Academic Performance Report (TAPR) System. Ask your superintendent for a copy of your district's most recent annual performance report if you don't already have one.
- Get a copy of your current district goals and review them.
- Find out how success on your district's current goals is going to be assessed.
- Keep a copy of your district goals with you at board meetings.

### Adopting policies

- Ask for a copy of your district's policy manual to review.
- Have your board president or one of your colleagues give you a brief introduction on how to use the policy manual.
- Ask about your local procedures for adopting and revising policy.
- Read through and make sure you are familiar with both the *legal* and *local* versions of key policies you will need every day. Legal policies compile federal law, state law, and court decisions, providing the statutory context in which all other policies should be read. The local policies reflect decisions made by the board of trustees. Be familiar with the following:
  - Policy DGBA: Employee Complaints
  - Policy FNG: Student Complaints
  - Policy GF: Public Complaints
- Read all the policies that govern the conduct of board business, such as:
  - Policy BAA: Board Powers and Duties
  - Policy BBE: Board Member Authority

## Hiring and evaluating the superintendent

- Find out your board's evaluation cycle and what step in the process will be coming up next.
- Get a copy of the evaluation instrument your board will use and review it right away.
- Find out what procedure, if any, your board has established for you to ask questions about performance between the evaluation conferences.

## Adopting a budget and setting a tax rate

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- Review your superintendent's contract.

## Communicating with the community

- Find out what your board and district routinely do to keep the public fully and accurately informed.
- Find out who serves as the designated spokesperson for your board.
- Talk with your colleagues about the best way to respond to the community and to the press when you're on the losing side of a close and carefully watched vote.
- Find out what formal means your board uses to hear from your community.

## Board operations—meetings

- Find out who prepares the agendas for your board meetings and how you get an item included.
- Find out when you can expect to get agenda materials from your superintendent and what you do if you need additional information.
- Ask your board president what rules of order are used at your meetings.
- Make sure you understand the basic provisions of the Texas Open Meetings Act.
- Make sure you understand the limitations on closed sessions of your board.
- Study Policy BEC: Closed Meetings.
- Review Policy BED: Public Participation.

## Board operations—board members and the community

- Talk with your colleagues about how they respond in controversial situations.
- Learn your district's policies and procedures for handling community complaints, including:
  - Policy FNG: Student Complaints
  - Policy GF: Public Complaints

## Board operations—board members and the district staff

- Ask your superintendent to brief you about district hiring processes, especially about how community-sensitive positions, such as principalships and head coaching jobs, are filled.
- Talk with your colleagues and your superintendent about when it is appropriate for board members to raise concerns about district staff and what is the appropriate manner for raising those concerns.
- Be sure you are familiar with board policies and procedures for asking information of staff.
- Make sure you understand the basic provisions of the Texas Public Information Act, including your responsibilities as a temporary custodian of district documents.
- Study Policy BBE: Board Member Authority.
- Make sure you know your district's policy for hearing complaints from staff.

Review Policy BBE (LOCAL) and any local procedures regarding board member visits to campuses and be very careful to adhere to them.