

New School Board Member Orientation

Background: *(excerpts from WASB, The Focus, Volume 29, No. 3, January 2012)*

School boards are expressly authorized under section 120.13(32) of the state statutes to provide for the orientation and continuing education of school board members and persons who have been elected to the school board, but have not yet taken office in the general duties and responsibilities of the school board and the school district.

Wisconsin has not yet adopted any mandatory training or continuing education requirements for school board members. However, over the last 25 years, an increasing number of states have adopted such mandates. In fact an NSBA (National School Board Association) survey that was last updated in 2010 lists twenty states that currently have mandatory training or continuing education requirements for local school board members. To the extent that these state-specific mandates require coverage of specific topics, some of the most common areas identified in the laws include:

- The duties and responsibilities of school boards;
- School finance and fiscal oversight;
- Superintendent/board relations and superintendent evaluation;
- Open meetings and public records obligations; and
- Ethics and conflicts of interest

The Potosi School District believes that even though there is no mandatory training for board members in Wisconsin, conducting an effective orientation program for new board members is very beneficial to the individual new board member, the quality of the board as a whole, and to the District overall. For example, if board members understand their legal responsibilities as an employer, know the district’s policies, and fulfill their specific role in employment processes (e.g., contract renewal, discharge, etc.), then it is less likely that the board, or any individual member, will be accused of discriminatory conduct, individual bias, or violations of due process. The District understands that board members are volunteers from our community – usually not experts in education; and that issues of time, trust, and respect are important pieces to quality board performance. The District also understands that different people bring different talents, skills, and backgrounds to the board, which is valuable and need to be recognized.

As valuable as the District’s orientation program can be, a new board member will reach his/her full potential as a leader on the board only by contributing a great deal of personal effort toward the learning process. In addition, attendance at all board meetings is necessary to gain and understand the issues that are brought before the board. Board members also need to read everything in their monthly board meeting packet, school related e-mails, and WASB publications. It is also important to occasionally meet with the superintendent to gain an understanding of what he/she does and the current challenges the District faces, as they see them. Attendance at as many WASB workshops as possible is encouraged. The annual State Education Convention in January is something that should be planned for. Spend a good part of your time listening, thinking, and learning from what you hear from the Convention sessions. In addition, talk to parents, teachers, and students as you run into them in our community; attend after-school activities; and learn about the great things happening on our School District so that you can be an ambassador of our District to our community. Practice listening, and understand that we will never please everyone, but we should try to understand what it is that they are trying to tell us, and acknowledge their concern. That builds trust in our District.

Potosi School District Plan:

1. Before the spring election, the superintendent informs the candidates of the WASB New Board Member Gathering as a “save the date” notification. All candidates are to be contacted by the superintendent to (1) thank them for their interest in school board service; (2) invite the

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candidates to attend open-session board and committee meetings; and (3) offer courtesy copies of the meeting agendas and the publically available supporting materials for the meetings.

2. During the month of March, the superintendent meets individually with all new potential board members and goes over the Board Guide document with them; discusses reasons for their interest in the board, and gets to know them prior to the election. Whether the candidates are elected or not, this provides an educational outreach opportunity to help potential board members to better understand the role of the board, how the board operates and functions, and to informally share their ideas and concerns related to potential board service.
3. After the election and prior to the first board meeting for the new board member, the superintendent schedules meeting(s) with the new members to share and discuss an overview of current District goals and to go into greater detail on some of the information that was previously shared. The meeting(s) also allow time for more open-ended discussion and questions. Additional topics include the District’s education philosophy, objectives, mission, and values.
4. The board president and superintendent work together to pair each new board member with an experienced board member. This mentor program is intended to encourage extensive conversations between the mentor and new board member over a sustained period of time. The superintendent directs supplemental orientation activities that fall within areas of administrative expertise. Additional information about the Mentor Program is outlined later in this document.
5. The superintendent spends time with the new board members advising on how a board actually operates. Time is invested on the benefits of hearing a diversity of viewpoints on topics, and on how to professional robust discussion on topics can lead to improved decisions. Additional orientation activities/conversations that take place include:
 - a) Review of the role of board members and that of administration;
 - b) Explain how and when they will receive information and updates;
 - c) Review in more detail policies that relate to the board;
 - d) Explain how board meetings are conducted; provide an overview of the parliamentary procedure that is followed;
 - e) Review the superintendent’s job description and how the board and superintendent work together as a governance team;
 - f) Review previous evaluations that the board has conducted on itself annually;
 - g) Review how to handle and process calls they may receive;
 - h) Review some basic information on confidentiality, student records, the confidentiality of personnel matters, and how to address questions from the public;
 - i) Review a basic outline of board involvement in student discipline matters;
 - j) Introduce the new board member to district office personnel;
 - k) Provide a tour of the building;
 - l) If there are specific issues going on at the time a board member is elected, the superintendent will spend as much additional time as needed in talking about the topic – for example, non-renewal of an employee, expulsion process, confidentiality, legal parameters of discussing closes session topics, etc.
 - m) Have the new board members attend the WASB new board member orientation – try to have another board member and the superintendent also attend.
6. The board hosts regular board retreat workshops to review goals, discuss direction, and evaluate how the board as a whole is doing – which provides new members opportunities to talk about how to be a productive member of the board.

New Board Member Mentorship Program

Objective:

This program provides guidance, support, and a board connection for all new board members during their first year of board service by assigning seasoned board members to act as mentors. More specifically, the program focuses on:

- 1.) How to fully integrate the new board member by understanding board logistics and processes;
- 2.) Helping the new board member understand how they can contribute to the board; and
- 3.) Sharing governing principles and how effective boards function.

The program seeks to accomplish these objectives through the following:

- More fully engage a new board member to feel comfortable and welcomed through a one-on-one board member connection.
- Help the new board member to fully understand the district's strategic objectives and direction, and how best to contribute to future initiatives.
- Facilitate the new board member's acclimation by learning from another board member's perspective about board culture, board meeting format, board structure and how things get done at the board level, how best to contribute to board discussions, and how the board's governance role and process works.
- Provide an overview of the board members, board roles and responsibilities, and expectations for board member meeting preparation and attendance.
- Facilitate board member engagement and contribution, and a successful first year experience.
- Offer guidance for future mentoring of new board members.

Mentoring Process Overview:

1. Mentoring process will last approximately eight months. It will begin soon after the April election, and may end soon after the December board meeting. You and your mentee can determine if you would like to continue the mentoring past December.
2. Once a new board member is selected, the President and Superintendent will identify prospective board members to serve as mentors during the new board member's first year.

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3. Prior to the first board meeting the President and/or Superintendent conduct an orientation session with new board members. Topics include:
 - ✘ Strategic Objectives
 - ✘ SAIL Team Work
 - ✘ The Budget and Financial Situation
 - ✘ Board member travel and expenses reimbursement; and professional learning opportunities
 - ✘ How the board operates
 - ✘ Board meeting agenda makeup
 - ✘ Key board decisions
 - ✘ Board – Superintendent Relationship

4. Each mentor will receive the following:
 - ✘ Thank you letter or email from the President
 - ✘ The New Board Member Mentorship document
 - ✘ Onboarding packet the new board member receives

Successful Mentor Attributes:

1. Reflect a special interest in helping the new board member develop and empower them to make a meaningful contribution.
2. Provide specific feedback as well as operational expertise.
3. Share knowledge and insights about your experience and what you have learned through board leadership.
4. Be a good listener, good observer, and good problem solver; be approachable and accessible throughout the mentoring process.
5. Work with other board leaders to get their feedback on how to mentor; if they're mentors, what are they sharing with their mentees?

Mentor Expectations and Tasks:

- Send “Congrats” e-mail and include “What to expect before your first board meeting.”
 - specifically noting the professional learning opportunities, strategic priorities, and the governance role the board plays
 - include a personal touch that says something about what it was like for you as a new board member – what did you expect? How did you learn what to do? Other?
 - see sample e-mail enclosed

- Prior to the first board meeting:
 - contact new board member to provide an overview of the board culture, the roles and responsibilities of the board vs. the superintendent, the importance of a positive board – superintendent relationship, how to prepare for the meeting, and what to expect at board meetings
 - highlight the need to review board packet items prior to the meeting
 - explain that the board President will be in touch regarding board representative assignments

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- At the first board meeting:
 - make introductions to other board members (if appropriate)
 - encourage feedback on board meeting evaluation
 - throughout the meeting, check for understanding

- Following the first board meeting:
 - follow-up on the meeting and answer any questions
 - discuss board member role and expectations and how meetings and agenda items are arranged
 - highlight the need to review board packet items
 - provide feedback as to the board process and governance role; may have additional comments to add based on board discussion
 - ask your mentee:
 - What was most interesting about the meeting?
 - What was the most interesting topic?
 - What would you like to learn more about?

- Following the second board meeting:
 - follow-up on the meeting and answer any questions
 - follow-up questions can include:
 - What was most interesting about the meeting?
 - What was the most interesting topic?
 - What would you like to learn more about?
 - ask for feedback on mentoring experience and how it might be improved – complete mentoring program survey
 - during the mentees first year experience, keep notes of what could be incorporated to improve the mentoring experience; ask for feedback from your mentee

Suggestion: Throughout the year (and as your schedule allows), have one-on-one conversations with your mentee as board meetings (before and after the meeting), through e-mail, and over breakfast/lunch. Set up dates and times in your calendar to commit.

Mentee Expectations:

- Review all materials prior to meetings
- Stay abreast of board related communications and e-mails
- Follow-up in a timely manner
- Fully leverage your mentor relationship
- Don't be afraid to ask questions
- Keep notes of suggestions to improve the mentoring program / experience
- Other?

Recommendations / Tips for Success:

- Schedule meetings, calls, and follow-up communications on your calendar to commit
- Check in regularly with your mentor/mentee and superintendent
- Reference district resources on the website and WASB resources on their website
- Ask questions

Successfully executed mentoring programs can serve as an integral element to a new board member's productivity, engagement, and effectiveness. Thank you for your interest / willingness to serve in this very important role.

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Sample e-mail from mentor to mentee: (Mentor can use as a guide for his or her first correspondence)

Date

Dear _____,

Congratulations! On behalf of the entire Potosi School Board of Education, we're excited to welcome you to our Board/Superintendent leadership team.

The purpose of our mentoring program is to establish key board relationships that will provide you the opportunity to successfully develop as a board member; aid you in your professional and personal development; and enable our board to fully develop and build capability.

As a way to introduce you to the board process over the next several months, it is my intent to share with you what to expect during your first board meeting, what resources will help you acclimate to the board, and ways to help you discover how you can best contribute to the board based on your leadership competencies.

Over the next several months, I would like to schedule three or four 30 minute conversations to get to know you better. Here are some proposed dates/times:

In the meantime, I encourage you to check out the School District website and review our mission, strategic plan and objectives, and annual report.

Should you have any questions before our first call, don't hesitate to reach out to me. Again, congratulations and I look forward to talking to you soon.

Sincerely,

Mentor Signature

Mentor Contact Information:

Home phone number –
Cell phone number –
Work phone number –
E-mail address –
Home address –

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Sample e-mail to New Mentor from Superintendent:

Date _____

Dear _____,

Thank you so much for agreeing to be a mentor for one of our new board members.

As you are aware, the purpose of our mentoring program is to establish key board relationships that will provide the new board member the opportunity to successfully develop as a board member; aid his or her professional and personal development; and enable the School Board to fully develop and build capability.

As part of the mentoring process over the next several months (through the December board meeting), we encourage you to help the new board member understand board logistics, the governance role of the board, board-superintendent relationship, as well as how he or she can contribute to the board based on their leadership competencies. Some examples of ways to assist them include:

- Send them a congratulatory note prior to the first board meeting.
- Set up a time to chat prior to the first board meeting.
- Encourage them to visit the School District website, especially related to our mission, strategic priorities, and roles and responsibilities. They can also find additional information about board service on the WASB website.
- Share your experience coming on to the board as a new member – what was it like?
- Share what they can anticipate at their first board meeting.
- Discuss the importance of our governance role and the board-superintendent relationship.
- Ask if they have any questions for you.

On behalf of the entire Potosi School Board Team, thank you for your willingness to serve as a mentor. Your gifts of time, access, and board expertise will greatly benefit new board members and help build a better board. Thank you for making this investment in our board’s future.

Sincerely,

Superintendent