

First Steps for Newly Elected Board Members

Your board service journey starts now.

Use this guide to help navigate the transition from candidate to board member and prepare for a successful start to your service.

“Get-to-Know” Meetings

- ☐ Talk to your Board President and Superintendent about setting up meetings with the Superintendent and key administrators. Have coffee with current and former board members if you can.
- ☐ Focus on learning about District expectations and protocols and gaining a broader perspective on the issues currently facing your school district. If your district has a board manual/operating procedures, ask for a copy and read it carefully!
- ☐ Learn about board meeting protocols, budget processes and the typical flow of the school year when it comes to board meetings and requirements.
- ☐ Ask questions about board committees and the expectations of each trustee to participate.

Administrative Tasks

- ☐ Ask about how and when you may be included in district and board activities prior to being sworn in at the July reorganization meeting. For example, some districts may include you in the BOE distribution list for a weekly board packet (publicly available information only), permit you to attend retreats or executive sessions prior to July 1st and/or include you in graduation ceremonies.
- ☐ Find out when the July reorganization meeting is scheduled for so you can be sworn in as a board trustee.
- ☐ Expect to receive login credentials for a district email address (typically available on July 1st). It is highly recommended that you use only the district email for all board business.

Learning to be a Board member

- ☐ Plan for when and how to undertake NYS mandated training (WPSBA offers governance training in-person on Saturday, June 27th and NYSSBA offers fiscal training online or in person).
- ☐ Find out about mentor opportunities – does your board have a formal or informal mentorship program? WPSBA will provide you with an experienced board member mentor from another district.
- ☐ Bookmark the program page on WPSBA.org and watch for email from WPSBA & NYSSBA about learning and networking opportunities.

Board Member Resources

- ☐ Westchester Putnam School Boards Association – www.wpsba.org
- ☐ New York State School Boards Association – www.nyssba.org
- ☐ National School Boards Association – www.nsba.org
- ☐ Consortium of State School Boards Association – www.cossba.org
- ☐ “Becoming a Better Board Member” – book available through NYSSBA bookshop or at WPSBA Governance training