

Local Orientation for New School Board Members

June 2026

This is just a suggested outline. Districts should use local context to customize this training to meet the needs of their district.



New board members are to receive a local orientation within 120 days of election or appointment per 19 TAC 61.1. The purpose of the local orientation is to help them better understand policies, procedures, goals and priorities of the district. This orientation is to last 3 hours and the Superintendent, along with another board member (oftentimes the Board President) should conduct the orientation. Other key district leaders may be a part of the orientation, depending on district size and needs and desires of the district (ex: business manager, curriculum director, athletic director, etc).

Reminder...Just as with anything new, the first few months are a time to listen, learn and ask questions. Sometimes in education we forget that not everybody knows the terms we use so freely. Questions are always encouraged and welcome!

During local orientation please remind your new board members to participate in/attend training with Region 12. We find it a valuable experience when board members interact with trustees from other districts.

Examples of Documents/Resources to Provide (hard copy, shared drive or direct links)

- District Mission, Vision, Goals, etc.
- District Organizational Chart
- Board Operating Procedures
- Board Policy
- Code of Ethics (board members and professional educators)
- School Calendar
- Calendar of Board Meetings/Activities/Events/Monthly Topics
- Budget Calendar
- Recent Board Meeting Agendas
- List of Education Acronyms
- Most recent TAPR

Topics to be addressed per TAC 61.1:

- Curriculum and Instruction

- Business and Finance
- District Operations
- Superintendent Evaluation
- Board Member Roles and Responsibilities

Additional helpful topics for a local orientation:

- Basic Demographic Information - enrollment, ADA, special program percentages
- District Mission, Vision, Goals, etc. - include belief statements, motto, etc., and how this drives the development of campus and district level improvement plans (along with state and federal requirements)
- Board Meeting Basics/Board Operating Procedures - when and where the board meets, open forum, placing an item on the agenda, closed session, open meetings act/open records requests, general monthly agenda outline, regular meetings vs. emergency meetings, hearings
- Annual Board Planning Calendar - timeline for budget, evaluation and contracts for Superintendent and administrators, teacher contract timeline
- Board Policy - legal vs. local, administrative regulations, TASB index system, policy updates
- Budget Process - timeline for development each year, major categories and general percentages for each
- Consider a side-by-side perspective of the Code of Ethics for board members and educators
- Provide an overview of any major district initiatives
- Provide a district facilities tour, as appropriate

Note: The local orientation is open to any board member who wishes to attend.