



## Onboarding Checklist for New Board of Education Members

The superintendent and board president should meet with the new board member to review the items on this checklist.

### District Identity:

- Review the history of the district, demographics, key administrative contacts, organizational chart and calendars
- Provide a tour of facilities and review upcoming plans for maintenance and potential or planned projects

### Board Governance:

- Review Vision and Mission Statements, Core Values, Strategic Plan and Goals
- Review Code of Conduct and/or Code of Ethics for school board members
- Explain the evaluation process for the superintendent and treasurer
- Review the policy manual with particular attention to board meetings and public participation policies
- Review board, personnel and student handbooks

### Board Processes:

- Board Meeting Procedures:*
  - organizational meeting
  - work sessions/retreats
  - emergency meetings
  - executive sessions
  - meeting protocols and expectations
  - board committees
  - parliamentary procedure
- Agendas:*
  - creating the agenda
  - amendments to the agenda
  - role of the board president
  - public participation
  - voting
  - review of the past year's minutes

### Legal:

- Review Ohio's Sunshine Law and Open Meetings Act
- Review Ohio revised code
- Review public records law
- Review conflicts of interest and ethics violations



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### Finances:

- Meet with the treasurer to review school funding, including millage, levies and bond issues
- Review most recent Annual Financial Report, auditor's report and other financial information, including Tax Increment Financing (TIF) schedules
- Review the District Improvement Plans and School Improvement Plan(s)
- Review contracts, including any collective bargaining agreements between the district and certificated (teachers) and noncertificated personnel
- Review superintendent and treasurer contracts

### Legislative:

- Review legislative information, including how to contact legislators
- Review the roles of the Ohio Department of Education (ODE), the Ohio Department of Education and Workforce (DEW) and the State Board of Education

### Communications:

- Review the chain of command
- Review your district website, communications plan and media relations
- Review relationships with the PTA, booster clubs, foundations and/or staff members

### Instructional Program:

- Review your State Report Card
- Review Organization of Attendance centers
- Review regular, special and support programs
- Review student achievement, assessment and reporting
- Review the student handbook
- Review extra-curricular program and athletic code

### For Resources and Training:

Contact an OSBA Board and Management Services consultant at 614-450-4000