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**Appendix - GUIDELINES FOR NEW BOARD MEMBER ORIENTATION**

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Reference: [GP101 Governing Style](#)

In accordance with Board policy [GP101 Governing Style](#), new Board member orientation shall occur between the election of new Board members and January 1.

- A. After Board discussion, the Executive Committee or designee shall orient new Board members, providing information about the following items:
1. Policy Governance including
    - a. Duties, responsibilities, expected conduct, and limitations of the Board.
      1. Conflict of Interest Disclosure Statement
      2. Statement of Ethical Behavior
    - b. Duties of the Board officers; when and how the vote for these positions will occur.
    - c. Delegation to the Superintendent and holding the Superintendent and District accountable, including how to resolve concerns regarding District issues.
    - d. Establishing Ends Policies (goals) for the District and limitations on the means used to achieve the goals.
  2. Explanation and history of issues currently before the Board.
  3. Tour of Board rooms including microphones and amenities.
  4. List of upcoming conferences including dates, location, transportation and expectations.
  5. List of meetings Board members attend including times and locations.
  6. List of Board committees and invitations to attend each.
  7. The difference between the work done in study session and regular Board meetings.
  8. Parliamentary procedure basics including how votes are taken in the Board meeting and how a majority is determined in study session.
  9. When major items occur during the year according to Policy Governance (budget, administrator changes, etc.).
  10. Roster of Board members including contact information.
- B. The following items should be included in the orientation provided by the Superintendent or designee.
1. Tour of the Auxiliary Services Building and the District Offices.
  2. Tour of schools (one or two in the new Board member's area).
  3. Payroll and insurance information (new hire orientation through Human Resources)
  4. Reimbursements for mileage and where the forms are located.
  5. Parking permits and building access to be issued after Board member is sworn in.
  6. List of administrators including contact information.
  7. Presentation by each District department on general function of that department.
    - a. Administrators of Schools
    - b. Accounting
    - c. Auxiliary Services
    - d. Communications

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- e. Curriculum and Staff Development
  - f. Facility Services
  - g. Information Systems
  - h. Human Resources
  - i. Insurance
  - j. Jordan Education Foundation
  - k. Nutrition Services
  - l. Payroll
  - m. Purchasing
  - n. Student Services
  - o. Special Education
  - p. Transportation
8. Provide login information and training on use of Board online document system (BoardDocs).
9. Provide technology/electronic device for participation in Board meetings and communication.
- C. New Board members should be given the following resources to study on their own:
- 1. Utah School Boards Association (USBA)
    - New Board Member Workshop (in-person; December)
    - PowerUp Training
    - USBA Resources (requires member login)
      - Education Documents & Articles
        - USBA Recommended Videos
        - Acronyms
        - School Fees Audit 2018
        - Utah School Safety Advisory Committee Framework Similarities
        - Teacher Student Success Act (TSSA) Presentation 2017
        - USBA Articles & Recommended Readings
        - Every Student Succeeds Act (ESSA) Documents
        - USBA Handbook
        - ADA in Our Schools
        - Teacher Shortage Study
      - Master Board Award
      - Legislation
      - Advocacy
      - Board Governance
      - Membership Tools
        - Open Meetings Handbook
    - Risk Management & Loss Control
      - Active Shooter

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- ADA in Our Schools
  
  - 2. Utah.gov
    - [Public Meeting Act Training \(required\)](#)
    - [Utah State Auditor Training](#) (link to the Auditor's training portal)
    - [How Utah Schools Are Funded](#)
  
  - 3. Utah State Board of Education
    - Training on internal audits (R277-133-4) (required)
  
  - 4. NSBA
    - [NSBA Connect](#) - community discussions (requires member login)
  
  - 5. [Jordan School District](#)
    - [Board of Education](#)
      - [Board Policies](#)
      - [Board Meetings](#)
      - [Committee Assignments](#)
      - [Voting District Maps](#)
      - [BoardDocs](#)
    - [Administrative Policies](#)
    - [Directories](#)
    - [District Departments](#)
      - [Accounting, Budgets & Audits](#)
      - [Purchasing Policies & Guidelines](#)
    - [General Information](#)
- D. After three months of Board work, the Executive Committee or their designees will meet with each new Board member to follow up on each item listed above and resolve any lingering concerns or questions.

Revision history: 11/1/22