

New Trustee Checklist

LEGAL REQUIREMENTS FOR THE FIRST YEAR

As soon as feasible after election

Receive certificate of election prepared by presiding officer in compliance with Texas Election Code section 67.016. See TASB Policy BBBB(LEGAL).



Policies adopted by school boards are organized by topic into a policy manual. Your district's localized TASB policy manual is a customized set of board-adopted local policies and legal framework documents designed to meet a district's legal requirements and address local issues. Local policy codes are marked (LOCAL), and legal framework documents are marked (LEGAL).

Find out more about policies at tasb.org/solutions-services/policy-governance.

Read and sign Statement of Elected Officer and take oath of office. Tex. Const. art. XVI, § 1. See TASB Policy BBBB (LEGAL).

First week

File conflict-of-interest disclosure forms as applicable.

These requirements are ongoing and apply to all school officials as defined by state law and district policy:

- You need to file Form CIS (available on the Texas Ethics Commission website at ethics.state.tx.us/data/forms/conflict/CIS.pdf) with the district records administrator (often the superintendent's secretary) if any of the following apply: within the last year, you or your first-degree family member have received taxable income of more than \$2,500, or gift(s) with a value of more than \$100, from a school district vendor; or you have a family relationship within the third degree of relation to a school district vendor. See TASB policies BBFA(LEGAL), (LOCAL).
- If you or a second-degree family member have a substantial interest in a company that does business with the district, state law may prohibit the company from bidding on a new contract with the district, so talk to your legal counsel. If the transaction is not prohibited, you may need to complete and file with the district records administrator the vendor's questionnaire form

CIQ (available on the Texas Ethics Commission website at ethics.state.tx.us/data/forms/conflict/CIQ.pdf). See TASB Policy CHE(LEGAL).

- Other disclosures may be required by trustees in your district by state law or local policy. See TASB Policy BBFA(LOCAL). If you are not sure what laws apply to your district, contact an attorney.

First two weeks

Complete the form to withhold personal information, such as your home address, phone number, emergency contact information, and family information, from the district's response to a request for public information. See TASB Policy GBA(LEGAL).



Access TASB guidance specific to new board members at tasb.org/resources/new-school-board-member.

Receive introduction to TASB resources and set up your TASB login.

First 90 days

Attend one to two hours of Open Meetings Act training. Tex. Gov't Code § 551.005. See TASB Policy BBD (LEGAL). Open Meetings Act training is available in the Online Learning Center at onlinelearning.tasb.org.

Attend one to two hours of Public Information Act (PIA) training if required by local policy. Board member training on the PIA is recommended but not required if the district has delegated responsibility for the training to the superintendent or other administrator in Policy



TASB Legal Services has online resources about the Texas Open Meetings Act at tasb.org/resources/esource/esource-index.

The Texas attorney general offers free online training at texasattorneygeneral.gov/open-government/governmental-bodies/pia-and-oma-training-resources.

BBD (LOCAL). Tex. Gov't Code § 552.012. See TASB Policy BBD(LEGAL), (LOCAL).

First 120 days

Receive orientation to local district policies and procedures, including, but not limited to, an introduction to the following:

- Current school board policy manual and any board operating procedures.
- Policies governing board meetings and trustee responsibilities in policy manual Section B on governance.
- District goals and priorities.
- District budget calendar and process for board adoption of budget and tax rate.
- Superintendent evaluation instrument and process.

Attend three-hour orientation on the Texas Education Code delivered by a regional education service center (ESC).

Attend a three-hour Evaluating and Improving Student Outcomes (EISO) session at an ESC or with an authorized

provider. TASB is an authorized EISO provider and can offer these sessions at our conferences or by request from local boards.

Attend one-hour training on identifying and reporting potential victims of sexual abuse, human trafficking, and other maltreatment of children. Trustees can also meet this training requirement in the Online Learning Center at onlinelearning.tasb.org. See TASB Policy BBD(LEGAL).

Complete the State Board of Education's (SBOE) two-hour school safety course provided free online at TEA Learn, register.tealearn.com.

Complete the SBOE's five-hour parental rights course provided free online at TEA Learn, register.tealearn.com.

First year

Participate in a team-building session that includes an assessment of continuing education needs with the entire board of trustees and the superintendent.

Attend at least 10 hours of additional continuing education based on assessed needs and SBOE-approved Framework for School Board Development.

Complete annual cybersecurity training in accordance with the Texas Cyber Command guidelines. See TASB Policy CQB(LEGAL) and state Certified Cybersecurity Training: www.txcc.texas.gov/certified-cybersecurity-training-programs.

Board members who have access to a district computer system or database and use a computer to perform at least 25% of their required duties, as determined by the district, must complete annual artificial intelligence training in accordance with DIR guidelines. See TASB Policy CQD(LEGAL) and DIR Certified Artificial Intelligence Training: dir.texas.gov/ai-and-innovation/public-sector-artificial-intelligence-ai-awareness-training.



You can find more information about school board trustee training requirements, including a list of approved training providers, on the Texas Education Agency website at tea.texas.gov/health-safety-and-discipline/school-boards/school-board-member-training/school-board-trustee-training.



For more information on board training and other legal requirements, visit TASB School Law eSource at tasb.org/esource.

Additional Resources

Board development and events | TASB Board Development Services | tasb.org/solutions-services/boards-leadership, 800-580-8272

Continuing education credit | TASB Board Development Services | tasb.org/solutions-services/tasb-solutions-services-listing/mycec, 800-580-8272

TASB login | loginsupport@tasb.org, 800-436-8501

Policy | TASB Policy Service | tasb.org/solutions-services/policy-governance, 800-580-7529

TASB Legal Services | Legal Line | tasb.org/legal, 800-580-5345

TASB publications | store.tasb.org

TASB School Law eSource | tasb.org/resources/esource

TASB | tasb.org



Texas Association of School Boards
P.O. Box 400
Austin, Texas 78767-0400