

# 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 policy manuals maintained by the school district. Your local policy manual contains TASB's (LEGAL) reference policies and board-adopted (LOCAL) policies.

Find out more about policies at [tasb.org/solutions-services/policy-governance](https://tasb.org/solutions-services/policy-governance).

Read and sign Statement of Elected Officer and take oath of office. Tex. Const. art. XVI, section 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](https://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 own, or are a representative of, an entity that does business with the district, you must also 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](https://ethics.state.tx.us/data/forms/conflict/CIQ.pdf)). See TASB Policy CHE(LEGAL).

- Other disclosures may be required of trustees in your district by state law or local policy. See TASB Model 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).

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



Access TASB guidance specific to new board members at [tasb.org/resources/new-school-board-member](https://tasb.org/resources/new-school-board-member).

### 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](https://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 BBD (LOCAL). Tex. Gov't Code § 552.012. See TASB Policy BBD(LEGAL), (LOCAL).



TASB Legal Services has online resources about the Texas Open Meetings Act at [tasb.org/resources/esource/esource-index](https://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](https://texasattorneygeneral.gov/open-government/governmental-bodies/pia-and-oma-training-resources).

## First 120 days

If you have not already attended a local orientation, 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 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 regional education service center.

Attend a three-hour Evaluating and Improving Student Outcomes (EISO) session at a regional education service center with an authorized provider. TASB is an authorized EISO provider and can offer these sessions at our conferences or per requests 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](https://onlinelearning.tasb.org). See TASB Policy BBD(LEGAL).

Complete the Texas School Safety Center's two-hour school safety course provided free online at SBOE - School Safety Training - TEA Learn, [register.tealearn.com/courses/sboe---school-safety-training](https://register.tealearn.com/courses/sboe---school-safety-training).

## First year

Participate in team-building session and assessment of continuing education needs with district board of trustees and superintendent.

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

Attend annual cybersecurity training in accordance with with the Texas Department of Information Resources guidelines. See TASB Policy CQB(LEGAL) and DIR Certified Cybersecurity Training. See TASB Policy BBD(LEGAL).



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/Texas\\_schools/school\\_boards/school\\_board\\_member\\_training](https://tea.texas.gov/Texas_schools/school_boards/school_board_member_training).



For more information on board training and other legal requirements, visit TASB School Law eSource at [tasb.org/resources/esource](https://tasb.org/resources/esource).

## Additional Resources

Board development and events | TASB Board Development Services | [tasb.org/solutions-services/boards-leadership](https://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](https://tasb.org/solutions-services/tasb-solutions-services-listing/mycec), 800-580-8272

TASB login | [loginsupport@tasb.org](mailto:loginsupport@tasb.org), 800-436-8501

Policy | TASB Policy Service | [tasb.org/solutions-services/policy-governance](https://tasb.org/solutions-services/policy-governance), 800-580-7529

TASB Legal Services | Legal Line | [tasb.org/legal](https://tasb.org/legal), 800-580-5345

TASB publications | [store.tasb.org](https://store.tasb.org)

TASB School Law eSource | [tasb.org/resources/esource](https://tasb.org/resources/esource)

TASB | [tasb.org](https://tasb.org)

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