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RESOURCE 05
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New Board Member & Board Meeting Toolkit

Everything a superintendent needs to onboard new trustees after the May 2027 election and run lawful, effective meetings: training deadlines, Open Meetings basics, a sample agenda, and tips for presenting budgets and bad news.

Current as of November 13, 2026 · Based on 19 TAC ch. 61, Tex. Gov't Code ch. 551–552, TEC ch. 11, and TASB guidance

01 THE ELECTION-TO-ONBOARDING TIMELINE

WHEN	STEP
Jan–Feb 2027	Candidate filing period for the **May 1, 2027** uniform election. Many districts list about Jan 13–Feb 12; confirm your exact dates. Candidates may take parental-rights training up to one year before being elected.
May 1, 2027	Election day. Unopposed races may be canceled and candidates declared elected.
After canvass	Canvass results, administer the oath, and seat new trustees. Many boards also reorganize officers at this point.
First 90 days	Open Meetings Act and Public Information Act training.
First 120 days	Local orientation, TEC orientation (through your ESC), Evaluating and Improving Student Outcomes, school safety, parental rights (5 hrs), and abuse prevention.
First year	Team building, cybersecurity, AI, and 10 additional Framework hours.

Sources: TASB Current Trustee Training Requirements; 19 TAC §61.4 (parental rights, adopted 2026); district election notices. Under HB 3546 (2025), boards may choose to move trustee elections to the November uniform date.

02 LOCAL ORIENTATION AGENDA (3 HOURS)

Hour 1: Who we are

- District mission, goals, and board-adopted targets
- Enrollment, demographics, and campuses
- Accountability ratings and the TAPR

Hour 2: How we operate

- Budget and finance, including HB 2 allotments and fund balance
- District operations: safety, transportation, facilities
- Superintendent evaluation process

Hour 3: How the board works

- Board vs. superintendent roles (TEC §11.1511, §11.201)
- Operating procedures and the team of eight
- Communication protocols and requests for information

Hand them

- Board policy manual access (TASB Policy Online)
- Current budget and strategic plan
- Training tracker and calendar (section 7)

19 TAC §61.1 lists orientation topics including business and finance operations, district operations, superintendent evaluation, and board member roles and responsibilities.

03 OPEN MEETINGS ACT: THE ESSENTIALS

- [ ] **Notice:** Post the meeting notice at least **72 hours** before the meeting, with the date, time, place, and each subject. Gov't Code §551.041, .043
- [ ] **Quorum:** A quorum discussing public business, including by text, email chain, or social media, can be a "meeting." Avoid "walking quorums." §551.001, .143
- [ ] **Public comment:** Members of the public may address the board on any agenda item before or during its consideration. §551.007
- [ ] **Closed session:** Only for listed exceptions, such as attorney consultation (§551.071), real property (.072), personnel (.074), security (.076, .089), and student matters (.082). Announce the statutory section, keep a certified agenda or recording, and **take all final action in open session**.
- [ ] **Records:** Board communications about district business are generally subject to the Public Information Act (Gov't Code ch. 552), even on personal devices.

Closed-session rules are technical. Run your agenda wording by your school attorney when in doubt.

04 SAMPLE REGULAR MEETING AGENDA

1. Call to order, quorum determination, and announcement that notice was properly posted
2. Invocation (optional) and pledges
3. Recognitions and celebrations (keep this short)
4. **Public comment** (per board policy BED)
5. Superintendent report: one strategic goal update with data
6. **Consent agenda**: minutes, financial report, investment report, routine purchases. Any trustee may pull an item.
7. Discussion and action items: one item, one recommendation, one motion
8. Required public hearings, when applicable (TAPR, FIRST, budget/tax rate)
9. Closed session (cite the specific §551 sections)
10. Reconvene in open session; take action on closed-session items
11. Future agenda items and adjournment

05 PRESENTING THE BUDGET SO TRUSTEES UNDERSTAND IT

Do

- Lead with three numbers: revenue, expenditures, and fund balance in months.
- Separate **restricted** HB 2 dollars from **flexible** dollars.
- Show a five-year trend and an enrollment scenario.
- Tie each major cost to a board goal.

Avoid

- Showing 40 slides of fund codes
- Surprises at the adoption meeting (preview in a workshop first)
- Mixing tax-rate and budget discussions without a clear timeline
- Jargon without a glossary

06 DELIVERING BAD NEWS TO THE BOARD

The 4-part framework:

1. **Tell them first.** Trustees should never learn bad news from the media or from social media.
2. **State the facts plainly:** what happened, what you know, and what you don't know yet.
3. **Show the plan:** immediate actions, who owns them, and when you'll update the board.
4. **Name the decision:** say what you need from the board, if anything, and when.

Use individual briefings carefully. Sharing information one-on-one is fine, but deliberating with a quorum outside a posted meeting is not.

07 TRUSTEE TRAINING TRACKER

TRAINING	DEADLINE	TRUSTEE 1	TRUSTEE 2	TRUSTEE 3
Open Meetings Act	90 days	☐	☐	☐
Public Information Act	90 days	☐	☐	☐
Local district orientation (3)	120 days	☐	☐	☐
Orientation to the TEC (3, ESC)	120 days	☐	☐	☐
Evaluating and Improving Student Outcomes (3)	120 days	☐	☐	☐
School safety (2, TEA Learn)	120 days	☐	☐	☐
Parental rights (5, TEA Learn)	120 days	☐	☐	☐
Preventing abuse and reporting misconduct (1)	120 days	☐	☐	☐
Cybersecurity / AI	First year	☐	☐	☐
Team building (3) + Framework (10)	First year	☐	☐	☐

The board president announces each trustee's training status at the last regular meeting before the trustee election, as required by 19 TAC §61.1. Confirm current hours and providers with TASB or your ESC.

Key board policy codes to review (TASB Policy Online)

BBD Training & Orientation · BE Board Meetings · BEC Closed Meetings · BED Public Participation · CE Annual Operating Budget · GBA Public Information Access

Policy codes follow the TASB system. Check your district's manual for local versions.

Onboarding new trustees this spring? Share Texas Ed Brief with your board. It's free and lands every Tuesday and Friday: **texasedbrief.org/subscribe**

Sources

- TASB, Current Trustee Training Requirements (tasb.org)
- 19 TAC §61.1 (Continuing Education for School Board Members); §61.4 (Parental Rights Training), adopted 2026, Texas Register
- Texas Government Code ch. 551 (Open Meetings Act) and ch. 552 (Public Information Act)
- Texas Secretary of State, Changing Election Dates (HB 3546, 2025)
- District election notices for May 1, 2027 (e.g., Northwest ISD, Community ISD)

This toolkit is a practical guide, not legal advice. Board operations are governed by statute, SBOE and commissioner rules, and your district's local policy. Consult your school attorney on specific situations. © 2026 Texas Ed Brief · Education Administrative Resources, LLC.

📌 KEY RESOURCES

TASB trustee training requirements
tasb.org/resources/current-trustee-training-requirements

TASB Policy Online: your local policy manual
policy.tasb.org

Texas Attorney General: Open Government (OMA/PIA)
texasattorneygeneral.gov/open-government

Open Meetings Act, Gov't Code ch. 551
statutes.capitol.texas.gov/Docs/GV/htm/GV.551.htm

TEA school boards: rules and parental rights training
tea.texas.gov/texas-schools/school-boards

Texas Secretary of State: elections
sos.texas.gov/elections

Texas Ed Brief resource library
texasedbrief.org/resources.html

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Links current as of November 2026. Requirements change, so check these official sources for the latest guidance.