

Summit School District Board of Education

Onboarding Plan for New School Board Directors

Purpose of the Onboarding Plan

This onboarding process helps new Board Directors understand their role, learn how the Board works, and get connected with the people and information they need. It supports a smooth transition, strengthens teamwork, and ensures Directors can begin serving effectively from day one.

More detailed tools and resources are in the [Board Handbook](#).

Getting Set Up After the Election

The Executive Assistant to the Board and Superintendent will help with:

- Election certification and documents
- SSD email, calendar access, and technology setup
- Google Drive access for Board materials
- Updating the SSD website with new member information
- Background check (started before swearing-in when possible)
- Technology device and district items (SSD ID card, metal name tag, purchase card, business cards, annual budget book, etc.)
- CASB membership, conference registration and details
- Office mailboxes
- Sharing the Board Handbook and key policies

Pre-Organizational Welcome and Orientation Meetings (Before Swearing-In Ceremony)

- All incoming board members to meet with existing board members
- Total of 7-10 hours over 2 to 3 meetings, if possible

Why this meeting is important:

- Helps everyone start on the same page
- Introduces important requirements and expectations
- Builds relationships early
- Supports smoother first meetings

Topics covered may include:

- Colorado's Open Meetings Law
- How the Board works together and treats one another
- What Robert's Rules look like in SSD meetings
- Board roles vs. Superintendent roles
- What to expect at the organizational meeting
- How the Board governs and communicates
- Superintendent evaluation process
- Annual meeting calendar, important dates and events

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Organizational Meeting (first official meeting)

- Oath of Office
- Signing confidentiality form
- Taking seats at the Board table
- Electing Board officers
- Onboarding session

Meeting With the Superintendent and District Leaders

To build understanding and strong working relationships, new Directors will meet with the Superintendent. The Superintendent's Office will schedule:

- An office tour (including mailbox locations)
- Times to meet:
 - Chief Financial Officer (Kara Drake)
 - Chief Transformation Officer (Laura Cotsapas)
 - Chief Talent Officer (Andrea Vertzantvoort)
 - Other SSD Team Members
- Orientation with the Board President, Chief Talent Officer, and Chief Financial Officer to review the negotiations/collective bargaining process and the Board's responsibilities
- Press release or video announcement of new Directors

Ongoing Support From the Continuing Board Members

A mentoring system pairing experienced Board members with new Directors is encouraged. This helps new Directors feel comfortable with:

- How Board meetings work
- How to read agendas and supporting documents
- The school visit system and committee roles
- How to use the Board calendar
- Board policies and how they guide decision-making
- Monitoring reports and how the Board evaluates progress
- Communication expectations with staff and the community
- Board norms, teamwork, and how we work together

Additional Onboarding Steps

- Board treasurer to schedule meeting with new board members for budget overview
- New school board director orientation at annual CASB convention in December
- Attend SSD board retreats (January and June)
- As a team, revisit onboarding process towards goal of continuous improvement (annual agenda)
- Ongoing orientation, board development, professional learning, and training