



# BoardDocs®

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## Practical Strategies for New School Board Members

As you prepare to welcome new members onto your board, consider these practical strategies that leverage technology to ensure a smooth transition:



**HOUSE DOCUMENTS ELECTRONICALLY FOR EASY AND EQUITABLE ACCESS.** The yearly budget, accountability results and board operating procedures are examples of documents that can easily be added to an online format.



**ALLOW VISIBILITY INTO GOAL-TRACKING AND BOARD PROGRESS.** This enables the new board member to spend time perusing not only the goals and objectives, but agenda items that are tied to those goals. The Strategic Plan section of the Library in BoardDocs, a Diligent brand, is the best way to list, as well as track and report, board goals.



**PREPARE RESOURCES FOR BOARD MEETING PROCEDURES.** Develop a procedures manual that can be housed online and includes informal, as well as formal, procedures. This could include items such as where and when the board enters the boardroom, where the restrooms are, when breaks typically happen, as well as the more formal procedures for things like visiting district campuses, communicating with parents and community members, and expectations for travel and training.



**AVOID OPEN MEETING VIOLATIONS FROM THE GET-GO.** Make announcements through your electronic agenda/meeting management tool as a smart alternative to emails, group texts or even social media posts which can all constitute an illegal meeting. New board members won't have an option to "reply to all" and will better remain in compliance with open meetings laws.



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## Quick Tips to Avoid Open Meeting Violations for New School Board Members

- Avoid the appearance of a secret meeting. Have discussions in the public prior to a decision—especially if the issue is controversial. Many board members avoid these discussions, but the public may assume a meeting was held in secret.
- While social events and ceremonies are not subject to open meetings, avoid discussing board business with other board members at these events.
- Never “reply all” to an email sent to board members. It is also best to avoid group texts. Boards should develop a policy that addresses the use of electronic communications.
- Questions of board process or factual content are acceptable between two board members, but avoid decision making.
- If you have a question about an agenda topic, send it to the superintendent and let the superintendent share it along with the answer to all board members. Chances are someone else has that same question.
- Never discuss board business on social media.
- Remain aware with whom you have discussed board business to avoid a walking quorum.
- Practice caution when handling the public in a meeting. During the public comment time, questions of clarification or fact are allowable, but a public comment should not prompt discussion among board members.
- Boards may place reasonable limitations on members of the public when addressing the board including time limits.
- Members of the public are allowed to record or broadcast public meetings (audio or video). Do not ask them to refrain from taping.
- Avoid actions, decisions, or determinations in closed session
- Do not participate in discussions of board business outside a meeting. If one begins, state your concern of open meeting violations and remove yourself from the discussion.

**NOTE:** Laws vary from state to state and this document is not intended to serve as legal advice.

Always consult your board’s attorney for clarification of legal questions.



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## Governance that makes a difference. Diligent's solution for public education.

As part of the Diligent family of governance solutions, BoardDocs is the paperless board management solution that provides customers with best-in-class security, top-rated customer support and constant innovation designed exclusively for the needs of your school district. We streamline the governance process to help you better serve your community.



BoardDocs is the worry-free, easy-to-use board management platform for education. BoardDocs meets the needs of school boards by providing a configurable, intuitive agenda creation and meeting management solution, with features like:

- Intuitive search capabilities
- Goal tracking and board planning
- Simple print functionality
- Quick and easy set up and implementation
- Policy management



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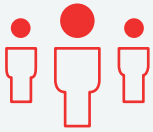
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# Diligent

**With over a decade of experience as the leader in the market, Diligent is the premiere provider of governance technology solutions across the globe.**



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users globally**



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continents**



**98.8% customer  
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security**



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service award  
winner**



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Diligent has brought BoardDocs into its family of brands, because of the BoardDocs commitment to excellence in governance, with a focus on the public sector. More than 3,500 school districts and public boards use BoardDocs to help streamline their governance needs.



*"BoardDocs increases the amount of time board members have to review the agenda, enabling them to better prepare for meetings. Electronic distribution not only saves time and resources, but it also provides unprecedented public access via our website to agenda items and other board-related information."*

**- Lisa Marquez, Miami Area Unified School District**