



NZSTA
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Governance support resources

Welcome to new trustees

This article gives ideas and suggestions on a framework for induction when new trustees are elected at a triennial election. This induction should be used whenever a new trustee comes on to the board, whether by election, by-election, appointment, or cooption. The focus of any induction programme needs to be around the questions of:

What do new trustees need to know?

What information do you wish you had been given when you started on the board in order to make more informed decisions?

Boards need to be mindful that no two induction processes should be exactly the same. Trustees come from different backgrounds, with different levels of knowledge and experience, both of your school and of their role as a trustee. They will all have different support needs in the same way that new members of staff have support and training needs.

New trustees' folder

In order to assist trustees to be as effective as possible when they join a board, NZSTA suggests that they receive a copy of Trusteeship – a guide for school trustees as soon as possible. If your board is a member of NZSTA, this will be sent automatically as soon as the trustee completes and submits [appendix 2](#). If your board is not a member of NZSTA, they will receive a copy of the Making a difference booklet. Trustees who are elected and do not have all the information they need are seriously hindered from participating fully. Ideally new trustees would be sent this resource and an accompanying folder with a welcome letter before attending their first meeting. What information could this folder include?

- Current board membership and contact details
- Trustee code of behaviour policy
- Board's triennial work-plan
- Board committee structure and delegations (if applicable)
- Board's triennial internal evaluation plan and process
- Board meeting schedule
- Minutes of last three open board meetings
- Principal's reports to last three open board meetings - including supporting documents
- Last three finance reports to the board
- Last three property reports to the board

- Latest ERO review report
- Details of any current Ministry of Education interventions/support at governance level

- Current charter/strategic and annual implementation plans
- Current budget
- Current governance (policy) framework
- Latest annual report, including analysis of

- School staff organisation chart

Board orientation

The board is committed to ensuring continuity of business and a smooth transition when board personnel change. Therefore:

1. The chairperson or delegate will meet with new board members to explain board policy and procedures.
 2. The chairperson, or delegate, after consultation with board members, will recommend to the board changes to committees and delegations.
 3. The principal and chairperson or delegate, will brief all new members on the organisational structure of the school, including roles and responsibilities of the board of trustees, its policies and processes, and the teaching and management structure of the school.
 4. The principal is to conduct a site visit of the school and clearly show what property there is and what is planned.
 5. New board members are to be advised of the professional development that is available from NZSTA. This should include an introduction to LMS and how to register for this.
- After three months on the board the effectiveness of the induction process is to be reviewed by the chairperson with the new members. It would also be beneficial at this time to check all trustees are registered for LMS and are working through the on-line modules.

The board may also wish to have an induction plan in place for the new board:

Induction Plan

Activity	Led by:	Outcome Expected
Ensure letter of congratulations has been sent with invitation to pre-meeting.		New trustees feel included and welcomed to the board. Trustees know what the next steps are. Trustees know what is expected of them.
Send trustee folders.		Trustees will have all the information they require in order to fulfil their role. Trustees can attend the pre-meeting and ask any questions.
Hold pre-meeting induction. Use trustee folder as the resource for this. Trustees taken on tour of the school.		Trustees get to know one another and the skills and experiences that each member brings to the board. Trustees get an opportunity to assess each person's strengths and weaknesses before electing a new chair. Trustees understand the requirements of the board chair role before electing the new chair. Trustees understand the charter. Fully informed trustees who understand the workings of the board. Trustees sign and agree to work within the code of conduct. Trustees are up to date with opportunities and risks facing the board.
Encourage board members to attend external new trustee training.		Trustees networking with other trustees. Opportunity to look at what we can and cannot do within the governance framework. Opportunity to compare our board's governance framework with others.

The board may wish to have an informal get together before the first formal board meeting. This allows trustees the opportunity to get to know each other as at the board's first formal meeting it will need to elect a chairperson.

At the pre meeting of the new board the board may find it useful to conduct a skills audit. This can be done verbally or have trustees fill out a form similar to this:

Sample trustee skills audit

1. What skills and experience do you consider you bring to the board?

- Curriculum knowledge
- Change
- Conflict resolution
- Equal opportunities
- Financial
- General strategic planning
- Governance
- History of the sector
- Human resources
- Knowledge of the community
- Legal
- Leadership
- Marketing
- Media/PR
- Policy implementation
- Property
- Other (please give details)

2. Are there any areas of the board's work you have a particular interest in and/or would like to become more involved in?

3. What motivated you to become a trustee at our school?

Ongoing support for trustees

Many boards budget for ongoing professional development for their board. If we are to truly model "the learning community" then we must lead by example. Professional development is not only for those boards that have new trustees. Every board should be looking to continually do things better – the good to great philosophy. Conducting a training needs questionnaire at the first meeting will support the board plan for this development. Eg:

1. What information or support do you think you need to carry out your role as a board member?

2. How would you prefer to learn about these areas?

Eg:

- Training sessions for the whole board
- Away day/weekends
- Attending training courses individually
- Information with board papers
- Regular briefings/workshops at board meetings
- Networking with other board members
- Learning from somebody else (mentoring, for example)

All professional development, advisory and support services provided by NZSTA are free of charge to boards of trustees.

New trustee mentor

A common way of providing further support for new trustees is to pair the new trustee with an existing trustee. The experienced trustee can serve as mentor and can guide them through the business of the board.

This system lets a new trustee find out background information and ask questions that put agenda items into context. Pre- and post-meetings may be useful as well, especially for boards that handle complex, sensitive, or technical issues.

Three Strikes and You're Out.

New trustees need to be aware that if they miss 3 consecutive meetings without leave from the Board then they are no longer a trustee. Tendering apologies is not the same as getting prior leave from the Board.

Appendix 2

All new trustees should ensure they have completed Appendix 2:

<http://www.trustee-election.co.nz/board-resources/election-forms-and-appendices/appendix-2>

Unless they do this they will not be listed on our database.

LMS

All new trustees should be encouraged to join the LMS by sending an email to the following address:

lms@nzsta.org.nz

This needs to include their name and school and a request to be activated for LMS.



nzsta.org.nz



facebook.com/NZSTAI



twitter.com/NZSchoolTrustee

Where do I get advice?

The *Governance advisory and support centre* advisers can also assist and are contacted on 0800 782 435, option 1 or govadvice@nzsta.org.nz