TRUSTEE AND BOARD EDUCATION

Resource for Trustees

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INTRODUCTION

This publication, *Trustee and Board Education*, is designed to help trustees, CEOs and others develop and implement systematic educational approaches to ensure that board members learn about and are able to perform their roles well. It addresses the need for education and training for candidates, new trustees, and continuing members. It complements other publications of the League, including the *Trustee Handbook* and *Trusteeship: Tasks, Knowledge and Skills brochure*.

All people who are elected or appointed to a community college board have something, and usually much, to learn about their new role. Well-informed and skilled board members are essential to the success of the board. With the information provided in this document, we hope it assists trustees and others to gain the knowledge and skills they need.
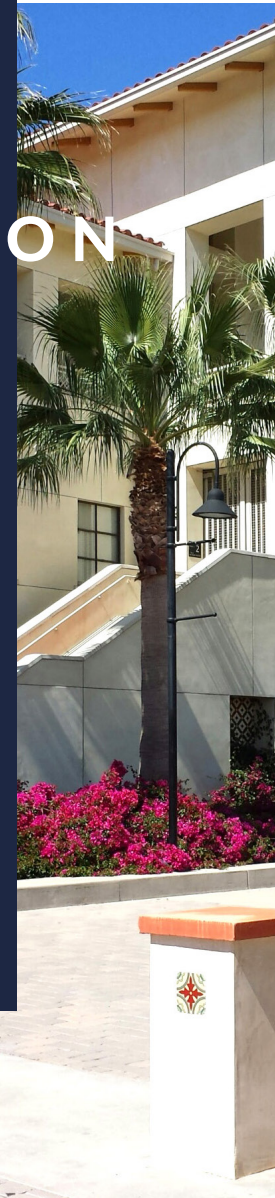
CHAPTER 1

PRINCIPLES AND APPROACHES TO TRUSTEE EDUCATION

As the policy-making body of the district, the governing board is responsible for the overall success of the institution and the students served. Ensuring that all trustees on a governing board are skilled and well-informed is essential.

Being elected or appointed to a community college governing board is only the first step in being a good trustee. Becoming an effective trustee and contributing to the board takes time, thought, learning, and practice. Therefore, all boards should have a systematic approach to trustee orientation and ongoing board education and development. All trustees should be involved, including the student trustee.

There are many reasons to have such an approach:

→ The roles are complex, information is vast, and there are many issues and interests. Virtually all new trustees are surprised at the amount of information and the complexities of the role. A systematic approach to trustee education produces well-informed and skilled trustees, faster.

→ Many trustees are new to public office and the requirements of related laws (e.g. the Brown Act). While most have served on other community boards, there are different demands and constraints involved as an elected official.

→ The first year on a board is a steep learning curve. Trustees who come from the non-education community need to learn "educationese" or "edspeak"– the acronyms and culture of academia, specifically California community colleges. Trustees who have education backgrounds need to learn about community and political needs and concerns to understand the broad, public context for their decisions.

→ Ongoing education helps all stay abreast of current events. Changes in state policy, the economy, and local community needs require trustees to always be learning.

→ New trustee orientation and an on-going board development program is an accreditation standard of the Accrediting Commission for Community and Junior Colleges (ACCJC). Standard IV.C.9 (2014) reads, in part: *The governing board has an ongoing training program for board development, including new member orientation.* Similar language is in the new 2024 Standard Three, #6.

Research shows that effective boards place a high value on board education and recognize that all trustees require specialized knowledge and training. Trustees ensure their colleges benefit when they make their own learning a priority. Learning is never-ending: trustees in their second, third and fourth terms on the board continue to expand their knowledge to stay abreast of issues and trends.

BOARD POLICY

In response to accreditation expectations, and simply as a matter of good practice, virtually all boards have a policy that addresses trustee orientation and education, and outlines expectations that board members engage in ongoing education. Districts that use the Community College League of California's *Policy and Procedure Service* numbering system cover this in Board Policy 2740.

Board policy on new trustee orientation usually include statements that address:

→ The expectation that all newly elected and appointed trustees, including the student trustee, have an orientation to the role

→ Who is responsible for the orientation (the CEO and/or board chair or board designee)

→ Orientation sessions with the CEO, board chair and key personnel

→ Topics and activities to be covered in orientation, such as campus tours and the provision of policy manuals and other key district documents

→ Mentoring practices, if any

→ Expectations for participation in the *Effective Trusteeship Workshop* and other conferences

→ Expectations for *Excellence in Trusteeship Program (ETP)* certification

Policy statements on ONGOING trustee education or board development may address the following:

→ All trustees engage in ongoing learning and professional development

→ Expectations for conference attendance and/or online seminars and training

→ A schedule of periodic retreats and study sessions focused on trustee skills and knowledge

→ Recommendations of ETP certification to be a board officer

PLANNING, IMPLEMENTATION AND EVALUATION

Planning and developing local trustee education programs involves a cycle of needs assessment, goal setting, implementation and evaluation. Individual trustees, the board as a whole, and/or a board committee participate in identifying needs for trustee education.

CEOs and board chairs (or their designees) tend to have primary responsibility for program implementation and ensuring participation by all board members. The executive assistant to the board and CEO provide significant support.

Identifying topics and strategies for trustee education is often done annually, perhaps in conjunction with a board self-evaluation or goal-setting session. The discussion focuses on what trustees and the board as a whole need to know to perform more effectively.

The concept of establishing student learning outcomes (SLOs) can also be applied to board education. Trustee learning outcomes (TLOs) state what knowledge and skill sets are expected as a result of the trustee education. Examples of such statements are: "new trustees understand their roles and the role of the board," "the board is knowledgeable about student success data," "trustees consider many perspectives in decision-making," and "the board understands and abides by the Brown Act."

Evaluating the effectiveness of trustee education will guide the design of trustee education for the following year. Were the study sessions helpful? Is conference attendance a good use of district funds? What books or other resources provide the best information? What did trustees learn? How did trustee education affect the functioning of the board? Responses to questions such as these helps determine what strategies should be used in the future: evaluation is essential to good planning.

SKILLS AND KNOWLEDGE

Trustees who are effective in their role have both sophisticated governing skills and comprehensive knowledge about the district and community.

Sophisticated governing skills include understanding the unique role of a governing board and the importance of being a member who makes positive contributions to the work of the board. Effective trustees represent and integrate multiple perspectives of the stakeholders. They are aware of the difference between policy and procedure, and embrace the policy level. They practice good communication and interpersonal skills.

Having comprehensive knowledge means that trustees understand the current and future learning needs of their communities, are aware of the history and culture of the college, and comprehend education trends and issues. Being effective also means being comfortable with technical information, such as laws and regulations, budget and financial summaries, and institutional effectiveness and other research data reports.

The specific skills and topics needed for success are further identified in various League publications:

→ The *Trusteeship brochure* describes the tasks, knowledge and skills that trustees

need to be effective. "Tasks" include such responsibilities as studying board agendas, setting expectations for and evaluating the CEO, following communication protocols, advocating for the college/district, setting expectations for and monitoring student success, etc. The "Knowledge" section lists topics such as state and federal funding; social and workforce needs and trends in the community, and the history and culture of the district's colleges. The "Skills" section includes good communication skills, critical thinking, integrity and trustworthiness.

→ The *Trustee Handbook* includes chapters that help trustees gain the skills and knowledge to perform their tasks and roles. Each chapter can be a "stand-alone" resource, and trustees may use it as a reference throughout their service. Reading and discussing a chapter at a time is a strategy some boards use as ongoing education.

HOW TRUSTEES LEARN

Individual trustees have different learning needs and styles. Therefore, effective trustee education provides opportunities for individual trustees to engage in a variety of educational strategies. **Research shows that adult learners learn best when:**

→ they have control over the learning experience

→ learning is problem-centered

→ learning is iterative (repeating or revisiting topics enhances learning)

→ what they learn has immediate application

→ there are opportunities for interaction and discussion

Therefore, trustee education should allow for self-direction and be customized to the schedules, needs and preferred learning styles of individual trustees. While there is a common core of knowledge that all trustees should have, different trustees will select what they need to learn and will learn it in different ways.

Some trustees will learn best through discussions, workshops and conferences. Others will learn more through reading, webinars and other self-directed approaches. Some prefer to immerse themselves in a body of knowledge prior to discussion; others prefer to learn as they go. Therefore, a variety of opportunities should be available, although all approaches should include opportunity to discuss questions, principles and applications. And activities that involve the board as a whole are important to build a common knowledge and skills base and to enhance teamwork.

Trustees also have different preferences on using technology. While it is an oversimplification to say the difference is generational, younger trustees tend to use technology to access

documents, while others prefer to receive hard copies of documents. Provide support and training for those who wish to learn to rely more on technology to reduce use of paper, but recognize that many will prefer hard copy.

It is also important to note that topics and issues should be revisited. The initial orientation to the role is essential, but the amount of information to be covered can be overwhelming. Board experience helps provide a framework for the concepts and principles, and subsequent sessions provide opportunities for in-depth exploration. (In fact, most trustees say that the *Effective Trusteeship Workshop* is even more meaningful the second and third times they attend, because they have a context for the information. The *Trustee Handbook* and other publications should be viewed as references, not documents that trustees peruse once.)

CANDIDATE EDUCATION

Learning about trustee roles and responsibilities begins when individuals are recruited for or indicate an interest in becoming board members. Candidates and potential candidates should know what the expectations and constraints are for the position. **Strategies include:**

Forums or Meetings with Potential Candidates. The CEO's office and groups within the college may sponsor informational sessions about board service, distribute informational materials to community groups to solicit interest from community leaders, and invite potential candidates to attend board meetings and to meet with the CEO and other campus leaders. Useful materials include the Community College League's Board Candidate Information and Trusteeship brochure.

Early Contacts by the CEO. As soon as the filing period is completed, the CEO should send an informational packet to all candidates. If the materials identified above weren't already provided, include those as well as the introductory chapters on the community colleges and trustee roles and responsibilities from the Trustee Handbook. The packet may also include general information about the district, such as annual reports, strategic plan summaries, and examples of board meeting agendas and minutes.

Meetings with Candidates. All candidates should receive an invitation to meet with the CEO to discuss board roles and current and future issues. Group sessions or individual meetings may be scheduled, depending on the candidate needs and number of candidates. Other college leaders, including board members, may also be involved.

NEW TRUSTEE ORIENTATION

Once someone is elected or appointed to the board, learning starts in earnest — see the "Next Steps" page on the League's website via the "Newly Elected and Appointed Trustees" page at the "Leadership Development" tab.

> **Chapters 2 and 3 provide comprehensive checklists for trustees and CEOs for trustee orientation.**

A checklist for new trustees is Chapter 3 of this document, and should be provided to all new trustees as a resource.

New trustees rate the Community College League's *Effective Trusteeship Workshop* offered each winter as one of their most valuable learning experiences. It covers board roles and responsibilities as well as educational, legal and fiscal policy roles, and gives newly elected and appointed trustees an opportunity to meet other trustees and state leaders.

Local orientation programs are essential. The CEO and Board Chair (or designee if necessary) are the major contacts for new trustees. Orientation is an ongoing process involving reading, meetings, college and program visits, experienced trustee "mentors," and participation in ongoing trustee education. A checklist for CEO's and board chairs is available in Chapter 2 of this publication.

The outcomes of local trustee orientation should be that new trustees have a sense of the history, traditions and culture of the colleges in the district; are knowledgeable about their policy roles and responsibilities; and have a general understanding of district programs and services. **Strategies include:**

Orientation Sessions. The most common component of local trustee orientation is a series of sessions for the new trustee with the CEO, the board chair and senior administrators. Many districts also arrange introductions to faculty, classified staff and student leadership groups. Sessions between the election and being seated may be helpful, but are essential during the first few months and through the first year of a new trustee's term.

The number of sessions varies from district to district and depends on trustees' needs and desires; but reasonable numbers are 4-10, at 1-4 hours each. These sessions educate trustees on board operations, policies, and the college programs and services, and provide ample opportunity for the new trustees to ask questions and learn protocol.

Board Workshops or Retreats. Boards may schedule workshops or retreats that address effective trusteeship, communication protocols, codes of ethics, the Brown Act, etc. They provide opportunities for all trustees to reflect and discuss their roles and responsibilities and foster team-building.

College, Center and Program Tours. Common components in local new trustee orientation programs are scheduled tours of the colleges, centers, and educational programs and services.

Mentoring. Experienced trustees can be a source of wisdom and information. Mentoring of new trustees often occurs naturally. Some districts assign a mentor from the board to initiate contact and attend events with new trustees (see Chapter 5 for "Mentoring Guidelines").

TRUSTEE EDUCATION STRATEGIES

The previous section on "how trustees learn" identified a number of strategies for trustee education and board development. The following provides further explication and examples.

Excellence in Trusteeship Program (ETP)

The League's *Excellence in Trusteeship program* guides trustees through a comprehensive educational experience. Trustees register in the program, and then obtain the training through League events and online education, local board training, and national association conferences and webinars. Upon completion of all modules, trustees receive the "Excellence in Trusteeship" certificate. As with all continuing education, this program was developed to provide recertification every few years to ensure that a trustee is current with new laws or policies; or even new areas that have been added.

New trustees in particular are encouraged to enroll in the program. **The training addresses competencies and knowledge in the following areas:**

→ Accreditation

→ Student Success

→ Diversity, Equity, Inclusion and Accessibility

→ Governance and Policy

→ Fiscal Responsibilities

→ Board Evaluation (Role and Effectiveness)

→ Ethics

→ Brown Act

A board may make a commitment to each other and their constituents to all attain ETP certification, and maintain recertification as needed. This is an effective way to work together toward a joint goal that benefits each trustee, the college district and the CEO.

Reading and the Web

There is a vast amount of reading available about trusteeship and educational trends and issues in periodicals, books and online. The most valuable comprehensive resource for California community college trustees is the League's *Trustee Handbook*. This publication is distributed to participants at the *Effective Trusteeship Workshop*, mailed to new trustees who don't attend, and posted on the League's website. In addition, many districts have local trustee handbooks, which contain district-specific information on board operations, policies and practices.

Board policy manuals and other district documents are an important source of information for all trustees. Accreditation self-studies and visiting team reports provide a comprehensive review of programs and improvement efforts. Strategic, educational and facilities master plans describe the direction for the college and contain the all-important mission, vision, values and goal policy statements.

New trustees gain a sense of the college history, programs and culture by reading college catalogs and schedules. Minutes and agendas of past board meetings help them become acquainted with board practices and priorities.

Trustees may also access webinars and other online training seminars, such as those on the Brown Act, ethics and fiscal responsibilities on the League's website, and accreditation basics by ACCJC. The Association of Community College Trustees (ACCT) also has a series of trustee webinars covering a variety of topics.

Retreats and Study Sessions

Study sessions and board retreats are one of the most commonly used strategies for ongoing board education. Surveys have indicated that, next to conference attendance, they are the most valuable strategy to provide ongoing learning.

The vast majority of boards hold an annual retreat once a year to review accomplishments and set goals. In addition, almost all boards schedule workshops or study sessions prior to or in lieu of some board meetings – for a number of boards, one meeting a month is devoted to business and the second meeting is a study session or workshop devoted to one or more special topics.

Most California boards belong to regional consortia, which help trustees explore and be educated about regional issues and establish a climate for collaboration among districts. Workshops with boards from districts with similar characteristics (small, rural, urban, or multi-college) also provide for sharing policy ideas and exploring common issues. Some districts find that joint workshops or meetings with local school district boards to be valuable.

Retreats and workshops are public meetings, and as such are subject to the Brown Act and must be appropriately noticed. However, rarely is any action taken, so that the public agenda states just the general topic, making it clear that there will be no action by the board.

Retreats provide an informal environment in which trustees, the CEO, and perhaps other members of the leadership team explore issues related to board and institutional performance and planning. They provide an opportunity for trustees and others to become acquainted on a more informal basis, which can promote teamwork and collaboration. While no board action is taken, direction and recommendations may be developed for action at a future meeting.

Retreats are usually half to full day workshops held in comfortable, informal surroundings. Often, the only people who attend are trustees and the CEO, plus invited staff. However, as noted above, they are public meetings.

Common topics are board self-evaluation, effective board governance, planning, envisioning and goal setting. Boards and CEOs also use retreats to design a search process for a new CEO, conduct the CEO evaluation, discuss board/CEO relations, review board policies, and have in-depth discussions about student success, district operations and institutional quality. Almost any topic that benefits from open and informal exploration is suitable for a retreat.

Many districts use outside consultants to facilitate retreats, which allows all members of the board and the CEO to participate equally by freeing the chair from the responsibility to conduct the discussion.

Study Sessions and Workshops are designed to inform the board about specific topics and allow sufficient time to ask questions, raise issues and discuss alternatives. Usually no action is taken, although recommendations and directions may be identified for action in the future. They may be held in lieu of a board meeting (often the "second meeting" of the month) or may be held in conjunction with a regular business meeting of the board. These sessions can be short presentations (e.g., 15 minutes), but generally are longer (1-2 hours) to provide time for questions, feedback and discussions.

Study sessions and workshops are particularly useful when the board will need to make a major decision at a future meeting. Thoroughly reviewing proposed programs or projects well in advance of the need to make decisions ensures that the board can give careful thought to the issues and that the staff is aware of board concerns and questions early in planning processes.

Common topics for study sessions held *in lieu* of board meetings are student success, budget and planning. Other topics may include institutional effectiveness reports, district organization or restructuring, board evaluation, new trustee orientation, policy reviews, technology, collective bargaining, student profiles and demographics, accreditation, and reports on major college initiatives and programs.

Study sessions held *in conjunction* with a board meeting tend to be on internal district operations and specific educational policy trends and issues. Trusteeship and board evaluation may be dealt with as part of a board meeting, although these are more often topics for a separate board session.

Study sessions are generally held in the boardroom or at a location relevant to the topic. They usually involve a presentation by college staff members, the CEO, or experts in a particular area, followed by discussion by the board and others as appropriate. Facilitators are rarely used.

Conferences

Regional, state and national conferences are major learning opportunities; they bring people together to discuss educational policy trends and issues, and board policies and practices. Events sponsored by the League and ACCT are the most applicable to community college trustees. Those sponsored by the American Association of Community Colleges (AACC), and Association of Governing Boards of Universities and Colleges (AGB) are also valuable.

Getting the most out of conferences is an art, particularly in the case of those that are not targeted solely for trustees. Trustees should focus on the policy implications of presentations and discussions, rather than on the operational aspects of a presentation. CEOs and others can help by identifying policy-level questions and issues for follow-up.

TIME AND RESOURCES

Being an effective trustee requires a commitment of time by the trustee, CEO, and board chair, and by the institution as a whole. Trustees estimate they spend from two to ten hours per week studying agendas, attending community and college events, and participating in board meetings; in multi-college districts, it may be more. Conferences and board retreats require additional time.

Board chairs and CEOs have even more responsibility to stay up-to-date on trusteeship issues. They use their knowledge to plan and implement orientation and ongoing education programs, and meet their other responsibilities to their boards.

Board and trustee education is a worthwhile investment in board and institutional effectiveness. Funds are needed for travel, conferences, reading materials, consultants, retreat facilitators and access to information technology. Thoughtful planning and application of resources ensures that trustee learning outcomes are achieved and that the board effectively governs the institution.

ROLE OF THE BOARD CHAIR, CEO AND EXTERNAL FACILITATORS

The president of the board (chair) is the leader of the board and plays an important role in planning and encouraging participation in trustee education activities. The responsibility may also be designated to another member of the board or outside expert if the chair does not have the time or necessary experience to fill this role. **The chair or designee:**

→ Welcomes new trustees and participates in their orientation

→ Assesses the needs for trustee and board development

→ Helps plan retreats and study sessions for the board

→ Participates actively in trustee education activities

→ Encourages all trustees to attend conferences and seminars

→ Asks for reports and evaluations of trustee development activities

The CEO plays a key role and generally has the responsibility for implementing a trustee education program once the board has weighed in on the plan. In fact, although the CEO is employed by the board, the CEO is a key contributor to board performance. CEOs are expected to keep the board informed, and ensuring that trustees take advantage of opportunities for growth and development is one way CEOs fulfill that responsibility. **Boards and institutions benefit when CEOs:**

→ Provide information to candidates

→ Ensure there is a program or plan for trustee orientation and board education and that it is implemented

→ Develop a comprehensive packet of district materials or local trustee handbook

→ Plan retreats and study sessions in consultation with the board

→ Encourage trustees to attend conferences and accompany them to events

→ Invite trustees to community and college-wide events

→ Are alert to opportunities for trustee learning

→ Ensure trustees receive information on current trends and issues

External facilitators or consultants include experts in trusteeship (who may also be experienced trustees or retired CEOs), attorneys, and others skilled in building relationships and creating learning environments. **They may:**

→ Present and facilitate discussions on trustee roles and responsibilities

→ Conduct workshops on the legal responsibilities and constraints

→ Address dysfunction on the board

→ Provide an objective perspective on board effectiveness

→ Work individually with trustees to help them be effective contributors to the board

SUMMARY

New challenges arise quickly, issues are increasingly complex, resources are limited, demands on colleges are increasing, and decisions are not always easy. Trustees are only successful if they continually seek information, are open to new ideas and engage in ongoing education. **Boards will improve their own effectiveness if they have plans and policies for trustee education that:**

→ Address individual needs, wants and learning styles

→ Provide opportunities for discussion and problem solving

→ Include a variety of strategies, such as reading, web access, conference attendance, retreats, study sessions and mentoring

→ Is fully supported by the CEO and board chair

→ Has adequate financial support

By being actively involved in ongoing trustee education, a board becomes a model for the entire institution. Boards engaged in learning foster an environment for learning in their organizations. A strong investment in board education pays dividends for the entire institution.

CHAPTER 2

TRUSTEE ORIENTATION:
A Checklist for Ceos and Board Chairs
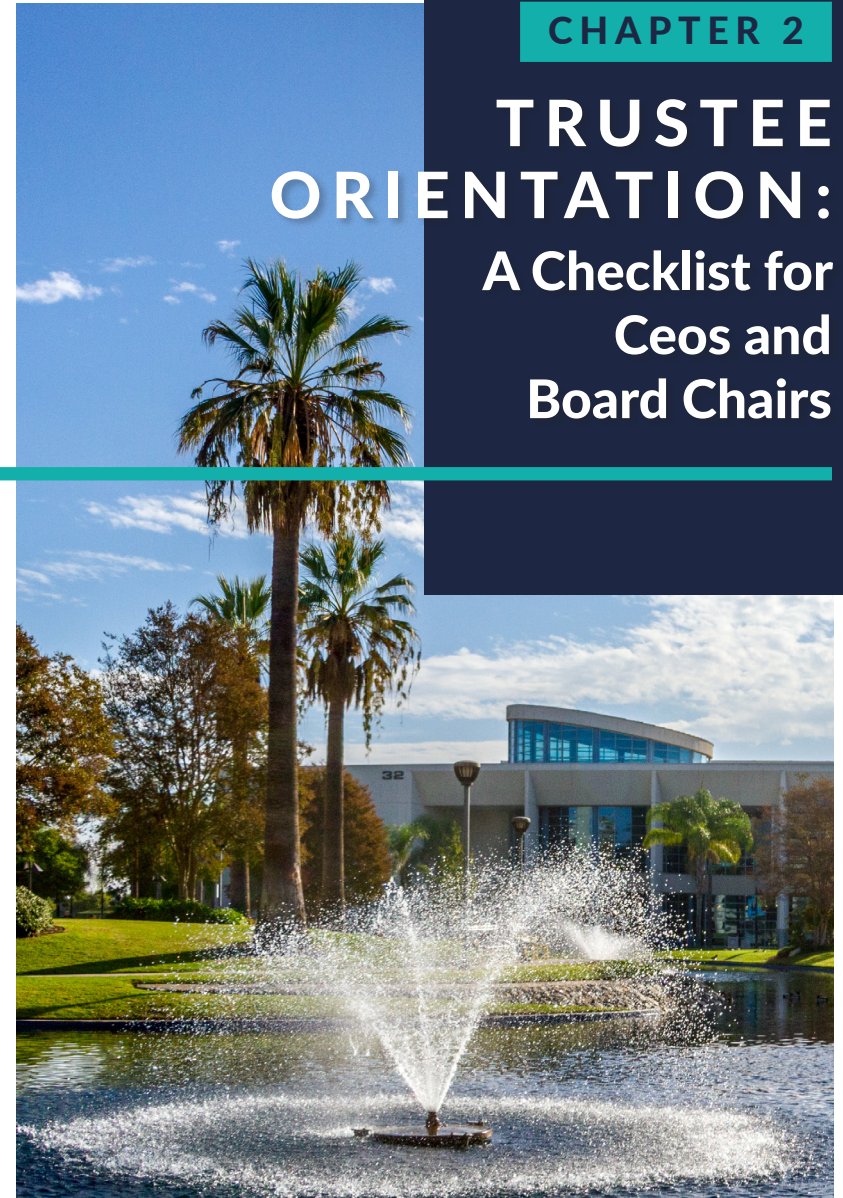
Chancellors, superintendents and governing board presidents play very important roles in orienting new trustees to their roles and responsibilities as board members. The following checklist is designed to help develop an effective trustee orientation program.

STEP 1. **Contact and Orient Candidates**

As soon as the CEO knows who has filed for election or appointment, the CEO should:

_____ Ensure all candidates have the following information:

→ The League's *Board Candidate Information*

→ Selected chapters from the League's *Trustee Handbook,* including "Governing Board Role" and "The California Community College System"

→ The board's policy on board duties and responsibilities

→ Summary information about the district, such as the annual report, district profile and strategic plan

→ Calendar of board meetings and expectations for board members

_____ Invite all candidates to one or more of the following:

→ A candidate information forum about the district and the board's role and responsibilities

→ Individual or group meetings with the CEO

→ Tours of the college(s) and centers

→ A group meeting with the current board chair and/or other trustees

→ Board meetings held prior to the election

STEP 2. **After the Election or Appointment**

As soon as the results of the election are known, the CEO and board chair (or designee) should determine which of the following actions should be taken, and who should address each one:

_____ Inform the League of the results of the election or appointment. New trustees will receive a welcome letter and educational materials, and will be added to the mailing lists

_____ Ensure the new trustee completes any required documents (conflict of interest and from human resources), sits for the official photograph, and understands travel and other expense procedures

_____ Arrange for new trustees to attend the League's *Effective Trusteeship Workshop* in Sacramento. Ensure that the CEO and/or Board Chair or other trustees accompany the new member(s)

_____ Arrange for the new trustee to enroll in the League's *Excellence in Trusteeship Program*, if desired

_____ Design a series of orientation sessions for the new trustee(s)

→ Schedule sessions with and/or introductions to:

▸ The board chair or designee

▸ Experienced board members

▸ The CEO (and all presidents in multi-college districts)

▸ Vice presidents or vice chancellors to review their areas

▸ Faculty, staff and student leaders

→ Discuss processes for participatory decision-making and guidelines for communicating with staff

→ Encourage new trustees to read and discuss the League's *Trustee Handbook* and board policies and practices

→ Schedule campus tours and visits to major programs

→ Provide a roster, with photos, of key district personnel and constituent leadership

→ Respect and honor individual differences of opinion, learning styles and backgrounds

_____ Provide comprehensive information about the board and district. Identify the documents that merit expeditious review. Provide links to online resources. Help new trustees set up an information filing system. Common documents are:

→ Board policy manual and use of BoardDocs (if used by the district)

→ Communication protocols and other guidelines

→ Local board handbook (if any)

→ Board meeting procedures (e.g., rules of order), agendas and minutes

→ Calendar of meetings and events

→ Strategic and master plans

→ Accreditation reports

→ Annual reports

→ Student Success and institutional effectiveness data summaries

→ College catalog

→ Glossary of terms

_____ Help integrate the new trustee into the board team:

→ Assigning or offering a "mentor" from the board (see Chapter 5, Mentoring Guidelines)

→ Provide social opportunities for trustees to get to know each other (within the constraints of the Brown Act)

→ Hold a retreat or workshop that involves all trustees in discussions of various topics

_____ Help new trustees strengthen their links to the external community and publics.

→ Arrange for new trustees to be invited to and attend community events or meetings with key community people and be sure they are introduced as new trustees

→ Invite them to attend a Foundation board meeting

→ Provide information about trends and educational needs in the community

→ Provide "talking points" to help new trustees be knowledgeable advocates for the district

_____ Maintain ongoing communication.

→ Set up an email address and include them in routine communication

→ Board chairs and "mentors" initiate contact with new trustees

→ Encourage new trustees to ask questions and seek information prior to board meetings, and call them prior to board meetings and offer to meet with them

→ Discuss lines of communication and who to ask for what information

→ Learn about and use trustees' preferred modes of communication to the extent practical

_____ Encourage new trustees to seek educational opportunities.

→ Alert them to upcoming state and national conferences (particularly those sponsored by the League and ACCT)

→ Establish an expectation for new trustees to attend conferences and explain how to obtain travel support

→ Strengthen partnerships and teamwork by arranging for the CEO and/or other board members to accompany new trustees to conferences and introduce them to others

New trustees have varied learning needs and styles, backgrounds, motivations for being on the board, and schedules and desires for learning opportunities. Therefore, local orientation to the trustee position will be different for each new trustee. However, the time and effort involved in providing a substantive overview and discussion of the district and trustee roles and responsibilities will reap future benefits.

NEW TRUSTEE LEARNING GUIDE

Becoming a member of a governing board for one of California's community college districts is an important and challenging responsibility. Successfully serving as a trustee requires dedication, time and education. New trustees may use the following checklist as a guide to learn about their unique roles and duties on the governing board. This checklist is not intended to be all-inclusive or accomplished quickly … learning is ongoing, iterative, and occurs throughout the first term and beyond.

Learn about Trustee Roles and Responsibilities

☐ Attend the annual *Effective Trusteeship Workshop* sponsored by the League. (This event has been rated by new trustees as one of the best ways to learn about their job.)

☐ Peruse the League's *Trustee Handbook*. Carefully read Sections 2 and 3 on governing board responsibilities and effective trusteeship.

☐ Peruse the local district trustee handbook, if the district has one.

☐ Become familiar with board policy on the governing board, particularly the code of ethics or standards of practice for the board, and the policy on board orientation and education.

☐ Meet with the chancellor or superintendent/president, board chair, and other members of the board to discuss trustee roles and responsibilities.

☐ Seek out someone from the board to use as a resource or mentor.

☐ Discuss with the CEO and other trustees the difference between the board's policy role and the CEOs responsibility for administration.

☐ Be aware of the legal and ethical constraints on trustees, including open meeting provisions, confidentiality, conflicts of interest and role in collective bargaining.

☐ Enroll in the League's *Excellence in Trusteeship program;* set a goal for completion.

☐ Plan to attend state and national conferences for trustees.

☐ Learn about online education modules and use them as desired.

Learn about the District's Programs, History and Culture

☐ Work with the CEO to arrange to meet with college presidents (in multi-college districts), top-level administrators, and faculty, staff and student leaders.

☐ Arrange to tour the college(s) and centers.

☐ Peruse the college catalog, accreditation self-study and team report, key planning documents, and annual report.

- ☐ Know the district and college mission, vision and policy goal statements, and the board's policies related to educational programs and services.

- ☐ Read about the history of the college. Plan to attend major district events, such as convocations, opening days and graduations.

- ☐ Read about the California community colleges in Section 1 in the League's *Trustee Handbook*.

Learn about External Trends and Issues

- ☐ Pay attention to local news and social media to identify trends that might affect the district.

- ☐ Strengthen links with key people and groups in the communities served by the district.

- ☐ Attend community events. Listen for issues that are pertinent to the colleges.

- ☐ Read about local demographic and economic trends that affect the district.

- ☐ Read about state legislative, fiscal and other policy issues that affect the colleges.

Learn about District Planning Processes and Budgets

- ☐ Working through the CEO, become familiar with the policy goals in the strategic and master plans.

- ☐ Meet with the appropriate personnel to review the policy aspects of the budget, its parameters and restrictions, the process for developing the budget, its relationship to strategic and master plans, and how the board monitors the fiscal health of the district.

- ☐ Read Section 4, Policy, Planning and Monitoring, and Section 7, Fiscal Responsibilities, in the *Trustee Handbook*.

- ☐ Read the League's publication, *Introduction to Fiscal Responsibilities*

Learn about Board Meetings and Board Operations

- ☐ Review past agendas and minutes.

- ☐ Thoroughly read the agenda for each meeting.

- ☐ Call or meet with the CEO, the board chair, and/or a mentor or other trustee before each meeting to seek clarification on agenda items (within Brown Act constraints).

- ☐ Become knowledgeable about basic parliamentary procedures and other practices related to participating in effective meetings.

- ☐ Be willing to observe and learn for the first few months to understand how things have been operating. Rely on the board chair, CEO or mentor when there are questions.

- ☐ Understand the key conditions of the Brown Act (open meetings law). Read Section 8, Legal Responsibilities, in the *Trustee Handbook*.

Practice Good Human Relations Skills

- ☐ Get to know other members of the board as individuals.

- ☐ Learn and respect communication protocols with other trustees, the CEO and staff members.

- ☐ Work to be a member of the board team. Wisely contribute ideas and opinions.

- ☐ Read Sections 5 and 6 on relations with the CEO and staff, and Section 3 on board effectiveness in the *Trustee Handbook*.

Use the Following to Help You Learn

→ The chancellor or superintendent/president.

→ The board chair, mentor, and other experienced trustees.

→ Resources from the Community College League of California and ACCT.

Learning is never-ending. Trustees who engage in ongoing education about their roles, responsibilities and important issues are outstanding models and policy leaders for their colleges.

A "CURRICULUM" FOR TRUSTEE EDUCATION

There are many resources that outline a "curriculum" for trustee development, including the table of contents of the League's Trustee Handbook, the curriculum of the Excellence in Trusteeship program, and the Trusteeship: Tasks, Knowledge and Skills brochure. The following list may also be helpful to trustees, CEOs and others as they identify topics for trustee education.

Topics for New and Student Trustee Orientation

Institutional Knowledge and Awareness

→ District and college mission, history and culture

→ District and college organization

→ Student success and learning outcomes definitions

→ The district's educational programs and services

→ District budget, budgeting processes, constraints and resources

→ Plans, major issues and trends

→ Campus layouts, off-campus sites and facilities plans

→ Institutional and student success data

→ College publications and websites

→ Rosters of trustees and key college personnel, including photos

→ Summaries of staff demographics

→ Policies and procedures regarding participation in local decision-making

→ Collective bargaining processes and contracts

Community Colleges

→ History and mission of community colleges

→ Structure of higher education in California

WHAT NEW TRUSTEES SAY WAS THE MOST IMPORTANT TO LEARN …

▶ Their policy-making role

▶ Fiscal issues and budgets

▶ The Brown Act and other legal conditions

▶ The role of community colleges

▶ How to listen and stay objective

▶ How to work as a unit

▶ How to build trust and teamwork with the board and CEO

▶ How to influence board decisions

▶ How to monitor without micromanaging

▶ Role of the faculty and others in participatory decision-making

▶ How to link with and represent the external community

→ State and national policy issues and trends

→ Key contents and constraints of Education Code and Title V

Community and Region

→ Demographics and related trends

→ Relationships with other educational institutions, local governments and business

→ Social, cultural and economic influences

→ Locally elected officials

→ Key community groups

→ The Foundation and its relationship to the district

The Board of Trustees

→ Concept of board as a unit

→ Board roles and responsibilities

→ Related laws and regulations

→ Board policies

→ Structure and operations of the board, including basic parliamentary procedure

→ The Brown Act's provisions and constraints

→ Board meeting agendas and how they are constructed

→ Relationships with and support from the CEO and executive assistant

Trusteeship

→ Code of ethics or standards of practices; conflicts of interest

→ Communication protocols with staff and the community

→ Working as a team; collaboration; influence

→ Trustee prerequisites and constraints

→ Education and training opportunities, including conferences, seminars, workshops and recommended reading

Topics for Ongoing Education

Governing Boards and Trusteeship

→ Approaches to and dimensions of effective board governance

→ Board policy review and development

→ Community links and representation

→ Board self-evaluation processes and criteria

→ Setting and achieving board goals

→ Collaboration, teamwork and conflict management

→ Effective meetings and agenda construction

→ Ethics and standards of practice

→ Board orientation and education policy and plan

Educational Policy Trends and Issues

→ Student success issues and trends

→ Workforce needs and trends

→ Educational quality, institutional effectiveness and accountability expectations

→ Alternative approaches in teaching and learning

→ State and national legislative and public policy proposals

→ Community, regional, state, and global trends and issues

→ Technology use and trends

→ Laws and regulatory changes

Institutional Programs, Trends and Issues

→ Accreditation

→ Collaboration with the community, business and industry

→ Governance practices, including participatory decision-making and the processes involved in developing recommendations to come to the board.

→ Strategic and long-range planning processes and documents

→ Educational programs and services

→ Institutional effectiveness and key performance indicators

→ Program reviews and implications for planning and budgeting

→ Fiscal projections and conditions

→ Facilities needs and planning

→ Employee contracts and negotiation process

Addressing these topics produces the outcomes that the governing board is effective and consists of individual trustees who bring comprehensive knowledge and skills to their policy-making responsibilities.

MENTORING GUIDELINES
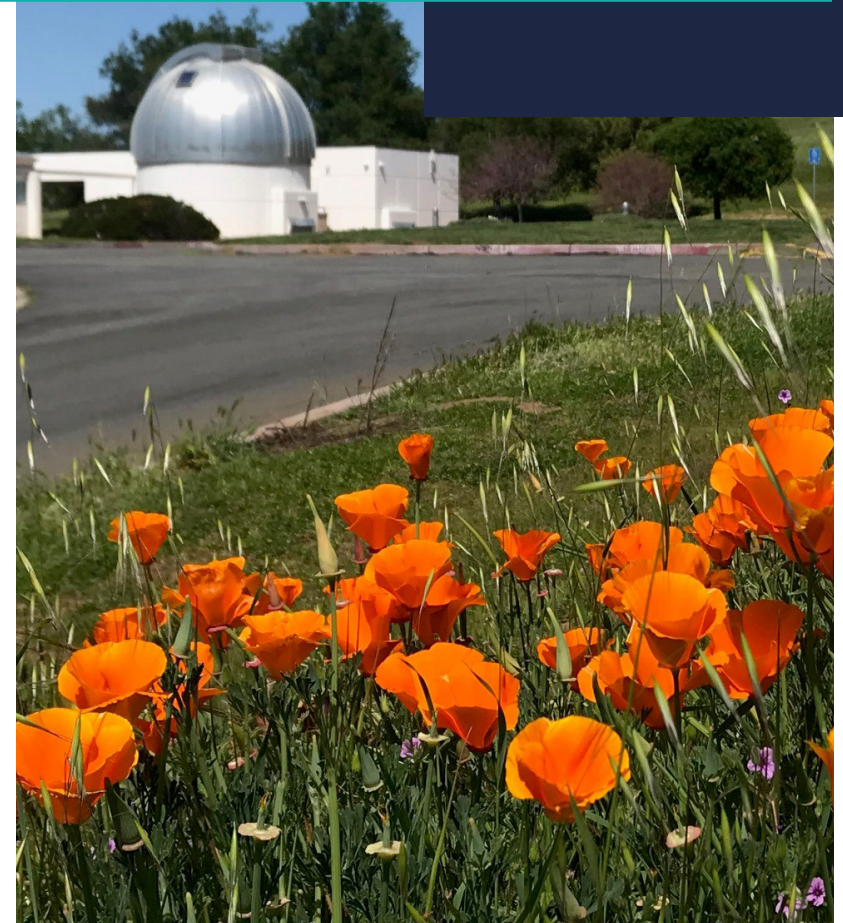
Effective mentors are defined as wise advisers who teach and coach less experienced people. Trustee mentors help new trustees learn their roles and responsibilities and make it easier for new trustees to quickly learn their jobs. They are often invaluable in helping new trustees understand the history and culture of the governing board and relationship with the CEO. They provide a safe environment in which new trustees can ask questions and seek guidance.

Mentoring may be a formal practice of the board. An experienced trustee volunteers or is appointed to be a mentor for the newly elected or appointed trustee. A board may have a written policy that addresses mentoring or simply may have a practice of identifying a mentor when new trustees join the board.

Board presidents are often in a mentoring role due to the position they hold. Since they are responsible for the effective functioning of the board, they play a larger role than other trustees in welcoming and integrating new trustees into the board team. Boards may also designate another member to be responsible for orientation and education.

Chancellors and superintendents/presidents also play a mentoring role when a new trustee comes on the board. The CEO is an invaluable source of information about the district, effective board practices and how to influence board decisions. Successful CEOs dedicate a great deal of time to supporting and providing information to their new trustees.

Informal mentoring occurs when a new trustee identifies someone with whom he or she feels comfortable, and seeks advice and counsel from that person. Mentoring may occur across districts – some new trustees are more comfortable talking with a trustee from a neighboring district or with trustees who hold state leadership positions. New trustees also seek advice and counsel from League staff members and others who work with trustees.

Any one of or all of the people listed above may act in a mentoring capacity, beginning when a trustee is elected or appointed and continuing throughout a person's time on the board. What is important is that new trustees feel comfortable with the mentor, trust his or her advice, and know that the mentor has their best interests at heart.

Successful Mentors
The best mentors are truly interested in helping others succeed and have the following qualities:

Exemplify High Standards of Trusteeship
Mentors are visionary, ethical, proactive, future-oriented and positive. They know how to focus on policy, support the college and contribute to a strong board/CEO relationship. They seek the "common good" rather than self-interest.

Have Excellent Human Relations Skills
They are good listeners and provide clear advice in a non-critical, direct manner. They understand interpersonal dynamics and how to work successfully in a group. They handle conflict well and exhibit civility, respect and confidence.

Model a Thirst for Knowledge
Effective mentors have active and inquiring minds and are always learning. They attend conferences and workshops, read broadly, and are active in the community. They are models for continuously seeking to be a better trustee and governing board member.

Have Time to be Available to New Trustees
They spend the extra time that is needed to contact, meet with, and go to conferences and other events with the new trustee.

In short, successful mentors have the qualities above and they do the following:

→ Initiate contact with new trustees and make themselves available

→ Have as the highest priority new trustees' success on the board

→ Are interested in new trustees' backgrounds, interests and assumptions about the role

→ Encourage new trustees to attend conferences. They may go with them to the Effective Trusteeship Workshop and other trustee conferences during the first year

→ Help new trustees identify what is most important to read and understand in the information they receive

→ Recommend resources for learning

→ Identify how to get things done as well as situations to avoid

→ Invite new trustees to community events and introduce them to key people

→ Ensure that the new trustee has good communication links with the CEO, the executive assistant to the board and other trustees

→ Practice what they preach (have effective trusteeship skills)

Successful mentors don't:

→ Try to influence new trustees' votes or sway them to a particular point of view on issues

→ Monopolize the new trustees' time and attention

→ Wait for the new trustee to initiate contact

→ Talk too much

Mentoring is an effective strategy in a comprehensive program to orient new trustees to their roles and responsibilities. It adds a personal, customized component to assisting new trustees become contributing, influential members of the governing board team.

LOCAL TRUSTEE HANDBOOKS
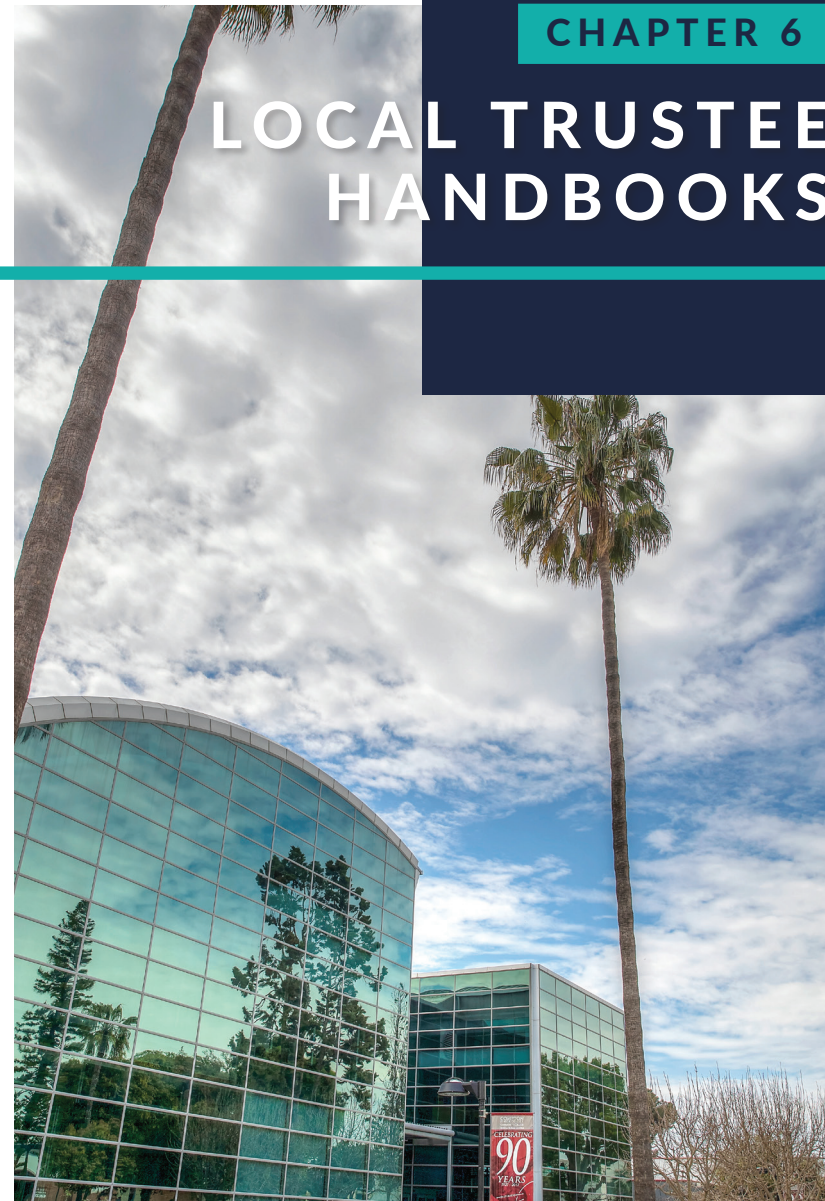
The League annually publishes a comprehensive *Trustee Handbook* that covers board and trustee responsibilities and provides other information relevant to the role. A number of districts augment the League's *Trustee Handbook* with a local trustee handbook or board book. The following is a sample table of contents.

1. **Board Responsibilities**
   Policies and other statements that cover board operations and roles, including:

   A. Board philosophy and purpose

   B. Responsibilities of the board and individual trustees

   C. Communication lines and protocols

   D. Ethics and standards of practice

   E. Board meetings

   F. Board agendas and how they are developed

   G. Trustee compensation and benefits

   H. Legal responsibilities

   I. Student trustee rights and privileges

   J. Board orientation and education

   K. Conference and travel opportunities and expenditure guidelines

   L. Board self-evaluation process and criteria

2. **Chief Executive Officer**

   A. Job description

   B. Annual goals

   C. Evaluation process and criteria

3. **Calenders**

   A. Board meetings and retreats

   B. Conferences of interest

   C. Budget, planning and reporting calendars

4. **District Information**

   A. District history

   B. District and college mission, vision, values and goals

   C. Summaries of strategic, master and educational plans and description of planning process

5. **Participation in Local Decision-Making Processes and Committee Structure**

   A. Role of faculty, students and staff

   B. Consultant process for recommendations that come to the board

6. **Budgeting Criteria and Assumptions**

7. **Personnel and Staff Relations**

   A. Trustee and key staff contact information

   B. Organizational charts

   C. Collective bargaining process and constraints

   D. Communication protocols

8. **Organizations and Agencies**

   A. Regional consortia

   B. League and CCCT boards

   C. National associations

9. **Parliamentary Procedure**

10. **College Maps**

CHAPTER 7

KEY ORGANIZATIONS AND WEB SITES

Community College League of California

www.ccleague.org

The League represents and serves the trustees and CEOs of California's community colleges by providing professional development programs for trustees and CEOs, advocacy, research and policy analysis, publications and reports, and financial services. The website provides links to trustee education resources, including webinars and publications, under the "leadership development" tab.

Association of Community College Trustees (ACCT)

www.acct.org

ACCT represents and serves community college trustees in the U.S. and Canada. The website includes current information on legislative and public policy issues, special projects, conferences and meetings, and educational materials for trustees such as webinars and publications.

California Community College Chancellor's Office

www.cccco.edu

The Chancellor's Office is the state agency charged with oversight of the colleges, and reports to an appointed Board of Governors. Their mission is to empower the community colleges through leadership, advocacy and support. The website includes numerous resources related to state policy and accountability. The Chancellor's Office maintains the "Student Success Scorecard," key information for all trustees. It is available at http://scorecard.cccco.edu/scorecard.aspx.

Academic Senate for California Community Colleges

www.asccc.org

The Academic Senate for California Community Colleges is a nonprofit organization that is the official voice of the faculty in matters of statewide concern. Policy analyses and recommendations are posted on its website, along with events and other issues important to faculty and the colleges.

American Association of Community Colleges (AACC)

www.aacc.nche.edu

AACC represents community and technical colleges in the nation and promotes, supports and advances the cause of its member colleges. It provides leadership through policy initiatives, advocacy, research, education services and coordination with other higher education organizations.

Association of Governing Boards of Universities and Colleges (AGB)

www.agb.org

AGB represents and provides services to higher education governing boards, with a particular focus on public and private university boards. It sponsors conferences and retreat services, conducts research and policy initiatives, and publishes Trusteeship and Priorities, as well as other books on trusteeship.

BoardSource

www.boardsource.org

BoardSource is a nonprofit organization that recognizes the critical role that boards play in overseeing their organizations' mission, finance and strategic direction. With more than 25 years of hands-on experience working with nonprofit boards, BoardSource provides extensive resources to help boards and their members provide excellence in governance.

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