

# Trusteeship Skills

## How to Get the Knowledge and Skills You Need

Effective trustees bring many skills, backgrounds and experiences to their positions. Following are desirable personal characteristics and skills.

### Interpersonal & Communication Skills

- Build and maintain good relations with a wide variety of stakeholders the public, board members, students and college employees
- Articulate ideas and perspectives
- Understand and accommodate different communication and leadership styles
- Establish and follow communication protocols
- Respond appropriately to media

### Analytical Skills

- Seek and weigh diverse perspectives and options
- Think critically and analyze complex and multi-faceted issues
- Understand basic fiscal principles and reports
- Understand and evaluate student success data

### Personal Characteristics

- Open-minded and curious
- Supportive and benevolent
- Enthusiastic and energetic
- Trustworthy
- Visionary
- Patient
- Good humored

### Values & Attitudes

- Hold student learning and success as the highest value
- Seek and be open to community interests and public participation
- Differentiate between policy and management
- Define and follow ethical principles in decisions and actions, including respect, integrity and fairness
- Honor the culture of the institution when making decisions
- Focus on the future of the college and the community

There are many resources and avenues for trustees to gain the knowledge and skills necessary to perform their important governance role.

### Board Workshops, Study Sessions, & Retreats

Local study sessions and retreats address a wide variety of topics, including advocacy, the Brown Act and other legal issues, budget and fiscal responsibilities, institutional effectiveness, planning and goal setting. Resource people for board workshops include college staff, League facilitators and consultants, attorneys and other specialists.

### District Administrators & Other College Leaders

Trustees, particularly new ones, meet with key college administrators and other leaders to learn about the district and its operations, including educational programs, fiscal operations, local decision-making processes, and human resources practices.

District personnel and attorneys are key resources for legal rules, including the Brown Act, conflicts of interest, and collective bargaining processes.

### State & National Workshops & Conferences

State and national workshops, particularly those sponsored by the League and ACCT, offer programs to enhance trusteeship, educate trustees on key policy issues, and learn about other board practices and issues. They provide opportunities to discuss state and national policy issues and trends and to shape the local district response.

### Practices in Other Districts

Boards benefit from reviewing models and examples from other districts, particularly those related to board policy, setting goals and learning outcomes, delivering education, monitoring operations, protocols for trustee/staff relations, and the like.

### Community Relations

Trustees learn about the community by attending community events, meeting with other community boards and board members, and reviewing staff reports on demographics, the economic outlook and other local issues and trends. Board workshops and state conferences provide skill training and strategies for connecting with the community.

### Network with Other Trustees

Trustees learn from each other through meeting and staying in contact with trustees at League and ACCT conferences, participating in trustee and CEO regional consortia, and attending meetings of groups such as the California Association of Latino, African American and Asian Pacific American Trustees.

### Reading the Web

Educational materials include briefing papers, board agenda items, and updates from the CEO; the League's Trustee Handbook and other publications on trusteeship; policy briefs and alerts from the League and ACCT; as well as resource materials on leadership and parliamentary procedure. Valuable websites include the League's at [www.ccleague.org](http://www.ccleague.org) and ACCT's [www.acct.org](http://www.acct.org), as well as others devoted to educational and legislative policy, effective governance and the myriad of topics in which trustees are interested.

# Trusteeship

## Tasks Knowledge & Skills



# Board Governance

**Trusteeship is a profoundly important gift of talent, time, and caring on behalf of the public for the success of students and colleges. As members of governing boards, trustees ensure that colleges add value to their communities.**

## An effective board:

- Creates strong ties to the community in order to best represent the public good.
- Governs through board policies that set broad goals for institutional accomplishments and standards of quality for district operations.
- Hires and supports a chief executive who will lead the district with excellence.
- Monitors the performance of the district to ensure that it is meeting current community needs and anticipating future trends.

## Questions?

Carmen Sandoval  
Director of Education Services and  
Leadership Development  
csandoval@ccleague.org

# The Tasks of Trusteeship

*Trustees are responsible to govern the college on behalf of the public. In fulfilling that role, trustees perform the following tasks.*

## Board Functioning

- Work with other trustees and the CEO as part of a team
- Define and fulfill officer and committee responsibilities
- Participate in board self-evaluation
- Study agenda materials prior to meetings
- Contribute to board deliberations
- Establish and follow rules for public participation

## Board & CEO Relations

- Conduct the CEO search
- Establish expectations for CEO performance
- Evaluate the CEO
- Maintain a strong board/CEO partnership

## Community & State Relations

- Represent community interests in decision-making
- Establish and engage in activities that educate trustees about community needs
- Be visible in the community
- Advocate the college in the community and at the state and national level
- Influence legislators and legislative staff to support community colleges
- Secure support from local leaders for community college interests

## District Relations

### Organizational Structure

- Respect the district organization and academic culture
- Set and follow protocols for communicating with college staff and students
- Explain district goals, programs and values to the community

## Local Decision-Making

- Ensure that faculty, staff, and students are appropriately consulted
- Consider faculty, staff, and student recommendations as appropriate

## Collective Bargaining

- Set parameters for negotiations
- Monitor progress of negotiations

## Ethics & Conflicts of Interest

- Establish and periodically review a board code of ethics/standards of good practice
- Observe codes of ethics and standards of practice
- Avoid conflicts of interest and the appearance of conflicts

## Fiscal Responsibilities

- Set policy standards for budget planning and fiscal management
- Consider and adopt the district budget
- Consider and approve changes to the budget as required by law
- Monitor the fiscal condition

## Educational Quality

- Require and set standards for student success
- Ensure district plans are related to district goals and community needs
- Monitor institutional performance
  - Compliance with policy standards
  - Employee performance and quality
  - Program quality
  - Planning implementation
- Participate in the accreditation process

## Policy Decisions

- Consider key trends and issues in policy decisions
- Require that policies are up-to-date
- Monitor policy implementation and adherence to policy standards

# What Trustees Need to Know

*In order to accomplish their tasks, trustees need to know the district they govern, principles of board functioning, and community and state issues.*

## Board Functions

- Board and trustee roles
- Board self-evaluation requirements and processes
- Brown Act provisions, including open and closed meeting requirements
- Rules for running and participating in meetings (basic parliamentary procedure)
- Board agendas and how to place items on the agenda
- How to work as a member of a team or unit
- How to influence board decisions

## Board & CEO Relations

- The differences between board and CEO roles and responsibilities
- Compensation and contract provisions
- Evaluation tools and processes
- How to maintain the partnership and support the CEO's leadership

## Community & State Relations

- Social, economic, and business trends and needs in the communities
- Key community and business leaders and other external stakeholders
- Strategies to learn about community needs and trends
- Advocacy strategies
- Key issues to advocate
- Legislators and the political process

## District Relations

### Organizational Structure

- Formal and informal organizational structure and rationale for its design.
- History, academic values and culture of the college(s)
- Protocols for communicating with employees

## Local Decision-Making

- Laws and regulations related to participation of faculty, staff, and students in decision-making
- The district's local decision-making process and responsibilities

## Collective Bargaining

- Compensation and contracts and the impact on the budget
- Legalities of collective bargaining
- Approaches to bargaining, such as adversarial and interest-based

## Ethics & Conflicts of Interest

- Laws and regulations related to conflicts of interest
- Local, state and national codes of ethics or standards of practice for trustees
- How to set and enforce standards
- How to reflect ethical considerations in decision-making

## Fiscal Responsibilities

### State Budget

- The state budget development process and how to influence it
- State constraints and requirements for local budgets
- How to maximize state allocation

### Local Budget

- Revenue sources and expenditure categories
- Board responsibilities in the budget process
- District accountability to the State
- How to read financial statements

## Educational Quality

- Standards for student success and learning outcomes
- District and college plans (e.g. master facilities, educational and strategic plans)
- Accreditation standards and other effectiveness criteria
- The board's role in accreditation

## Policy Decisions

- Related laws and regulations
- Board policy and the policy-making process
- Economic, social, and cultural trends that affect community college policy
- How and when to use legal counsel