

New Community College Trustee Learning Guide

Learn about Trustee Roles and Responsibilities

- ? Attend Trustee Orientation Workshops sponsored by state associations and ACCT.
- ? Peruse trusteeship materials, including those published by state associations, ACCT's Trusteeship in Community Colleges: A Guide to Effective Governance, and the ACCT website.
- ? Read the local trustee handbook, if there is one.
- ? Study the board's policies on the governing board, particularly the code of ethics or standards of practice for the board.
- ? Meet with the chief executive officer, 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 policy making and administration.
- ? Be aware of the legal and ethical constraints on trustees, including open meeting provisions, confidentiality, conflicts of interest, and role in collective bargaining or setting staff salaries.
- ? Arrange your schedule to be able to attend state and national conferences for trustees.

Learn about the College's Programs, History and Culture

- ? Work through the CEO to arrange to talk with key people about major programs and accomplishments of the district.
- ? Arrange to tour the college(s).
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 community colleges in general, including chapter 1 in Trusteeship in Community Colleges.

Learn about External Trends and Issues

- ? Read local newspapers and listen to the news for trends that might affect the college.
- ? Strengthen links with key people and groups in the communities served by the college. Attend community events. Listen for issues that are pertinent to the college.
- ? Read about local demographic and economic trends that affect the college.
- ? Read about state legislative, fiscal, and other policy issues that affect the colleges.

Learn about College Planning Processes and Budgets

- ? Working through the CEO, meet with appropriate people to explore 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.

Learn about Board Meetings and Board Operations

- ? Review past agendas and minutes.
- ? Thoroughly read the agenda for each meeting.
- ? During the first few months, don't hesitate to call or meet with the CEO, mentors or other trustees, and/or the board chair before each meeting to seek clarification on agenda items.
- ? 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. Call the board chair or CEO when there are questions.
- ? Understand the key conditions of open meeting laws and laws and regulations related to conflicts of interest.

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.

Rely on the Following Resources

- ? The Chief Executive Officer.
- ? The board chair and other experienced trustees.
- ? Your state trustee association
- ? Association of Community College Trustees

Checklist for CEOs and Board Chairs

Chancellors, presidents and governing board chairs 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 local trustee orientation program.

Step 1. Contact and Orient Candidates

As soon as the CEO knows who has filed for election or is seeking appointment, he or she:

Sends an information packet to all candidates, including:

- ? Information about the roles and responsibilities of governing boards and trustees (check with ACCT and state associations for resources)
- ? General information about the colleges
- ? Board policy statements about board operations (code of conduct, meetings, responsibilities, privileges and benefits).

Invite all candidates to one or more of the following:

- ? A candidate information forum about the college and the board's role and responsibilities
- ? Individual or group meetings with the CEO
Tours of the college(s)
- ? A group meeting with the current board chair and/or other trustees
- ? Board meetings held prior to the election to observe and be introduced.
- ? Treat all candidates the same, including incumbents.

Step 2. After the Election or Appointment

Arrange for new trustees to attend state association and/or ACCT orientations and workshops on trusteeship.

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

- ? Schedule information and discussion sessions with or introductions to:
 - The board chair
 - Experienced board members
 - The CEO (all presidents in multi-college districts)
 - Vice presidents or vice chancellors to review their areas
 - Faculty, staff, and student leaders.
- ? Discuss protocols 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.
- ? Respect and honor individual differences of opinion, learning styles and backgrounds.

Provide reading materials about the board and district. Identify the documents that are high priorities. Help new trustees set up an information filing system. Common materials are:

- ? Board policy manual
- ? Board ethics, procedures, and responsibilities (if not part of the policy manual)
- ? Local board handbook (if any)
- ? Strategic and master plans
- ? Accreditation reports
- ? Annual reports
- ? Institutional effectiveness summaries
- ? College catalog
- ? Organizational charts and lists of key personnel \

Assign or offer a "mentor" from the board.

- ? Use experienced trustees who will be able to gain the confidence of the new trustee.
- ? Mentors provide information on board culture and boardsmanship - not opinions on how to vote.

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

- ? Arrange for invitations to new trustees to community events or meetings with key community people. 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 information about the college to help new trustees be knowledgeable representatives.

Maintain ongoing communication links.

- ? Board chairs and "mentors" initiate contact.
- ? Encourage new trustees to ask questions and seek information prior to board meetings. Offer to meet with them prior to board meetings for the first few months.
- ? Discuss lines of communication and who to ask for what information.
- ? Ask new trustees what their preferred mode of communication is. Use that style to the extent practical.
- ? Set up an e-mail address and include them in routine communication.
- ? Call new trustees before board meetings to see if they have any questions.

Encourage new trustees to seek educational opportunities.

- ? Notify them of all upcoming state and national conferences
- ? Establish an expectation for new trustees to attend conferences; 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.

Step 3. Be Flexible

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 districts, as well as trustee roles, will reap future benefits. The time and effort will help new board members be well informed and participate effectively in the unit that is the board.