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# White Paper: Best Practices for Orienting New Community College Trustees

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## Introduction

Board of Trustee roles are complex and require a broad range of knowledge on academic, student, economic, and community issues and topics. Many new Board of Trustee members are new to public office or a position of this level of demand. The first year on a board is a steep learning curve, especially for those from non-education professional backgrounds.

This white paper aims to better understand the multiple development outlets for new community college trustees. We accomplished this through an examination of the sources of training and information provided to newly elected board members at the local, state (e.g., Iowa Association of Community College Trustees [IACCT]), and national (e.g., Association of Community College Trustees [ACCT]) levels. The resulting review can be utilized to ensure a comprehensive orientation and reduce duplication of effort in training among local and state entities.

We focus our effort in this white paper on application to practice within the state of Iowa. Specifically, this paper will aid in tailoring Iowa's state-level resources provided to board members by the IACCT and provide recommendations for local college-level orientation practice. Our focus, in part, will unpack the types of content best suited for delivery at the local (e.g., local community context), state (e.g., state advocacy, state policy, state finance), and national (e.g., federal policy, national landscape) levels. We conducted a document analysis of 692 pages collected from community college trustee orientation resources and meeting minutes from across the United States to inform this paper. We then applied qualitative coding and analysis techniques and identified key training themes from the data interpreted and presented in this white paper.

The following sections provide the results of our document analysis to describe the general training and onboarding needs of new community college trustees. It must be recognized that no two trustees are the same. Trustee education should allow for self-direction and customization to the needs of the trustee. Board members are established community members, and many have foundational understandings regarding the community and workforce needs and contexts. Others may not. The board chair should develop an individualized training plan for each newly elected trustee to best meet their unique needs and recognize the experiences they bring to the position.

Additionally, recognizing that duplication of effort may occur, our recommendations were developed with efficiency in mind to identify topics that could be delivered at the local level or common across the state by sources such as IACCT and the Iowa Department of Education (IDOE). Our study found that most national resources, primarily through ACCT, may be best oriented to the ongoing development of established trustees. Therefore, we focus here on local and state efforts in the initial orientation. We have organized our recommendations through six phases. The exact timing of each phase may vary depending on local context and individual board and trustee needs. While there is some chronological order to these phasing groups, the phases are not intended to be viewed in lockstep. There is likely to be an overlap of these phases in practice. However, we have intentionally clustered the core knowledge in a scaffolded sequence that starts with candidate education before election. After election, the first phase is focused on board essentials, followed by community college essentials, then higher-order institutional knowledge and community college advocacy. The final phase is ongoing education in recognition that trustee education is never fully complete should never end regardless of the length of service.

## Phase 0: Candidate Education

Board training should begin before an election through candidate education. The learning curve is steep for newly elected trustees, and a missed opportunity occurs without proactive efforts to educate potential and filed trustee candidates. The primary goal of candidate education is to understand the scope, expectations, and constraints of trustee positions and to provide all candidates with a foundational knowledge of the college. Before the election filing date, candidate education may take the form of public informational meetings for interested individuals to better understand community college board service, duties, and expectations. After the filing deadline, the candidates might observe a board meeting, be provided with informational packets, and meet with the college president to learn about the college. Candidate education is best delivered locally through board-organized events and actions.

Phase 0: Candidate Education	
Trustee expectations	Offering open, public informational meetings for potential candidates before the candidate filing deadline to educate on board service, duties, and expectations
Realistic position preview	Inviting all potential candidates to attend a board meeting
Basic community college data	Sending informational packets to all filed candidates with documents containing publicly available information about the college (e.g., the annual report, strategic plan, recent board minutes, and meeting calendar)
Current institutional issues and trends	Inviting all potential candidates to meet with the CEO to discuss current and future issues

## Phase 1: Board Essentials

After a trustee is elected, all new trustees should receive a general set of essential board information. This information is important to their initial integration into the work and operation of the board even before they are thrust into the issues and details of community college operations. Specifically, initial logistical details of meetings and board policies are needed before trustees assume office. This discussion should include a clear overview of trustee communication standards and protocols. New trustees should also be presented with the board roles, responsibilities, authority, and constraints early on in their orientation. An experienced board member should be assigned to new trustees to aid in their transition. Most board essentials are best delivered locally through board-organized events and actions. The IDOE may consider a statewide session that orients all new trustees to Iowa Code section 260C.14 that establishes and defines the authority of community college boards.

Phase 1: Board Essentials	
Logistics	<p>Orienting new trustees to the logistical aspects of becoming a trustee:</p> <ul style="list-style-type: none"> <li>• Oath of office</li> <li>• Conflicts of interest</li> <li>• Disclosures</li> <li>• Meeting and event calendars</li> <li>• Travel and reimbursements</li> <li>• Electronic file access</li> <li>• Trustee roster and contact information</li> <li>• College employee roster</li> </ul>
Board roles, responsibilities, and structure	<p>Overview of the roles and responsibilities of the board. Address the scope and limits of board authority:</p> <ul style="list-style-type: none"> <li>• Curriculum authority</li> <li>• Fiscal authority</li> <li>• Personnel authority</li> <li>• Operation authority</li> <li>• Contract/agreement authority</li> <li>• Policy authority</li> <li>• Reporting authority</li> <li>• General authority</li> </ul> <p>Overview Iowa Code section 260C.14 (board authority)                      Overview of board leadership positions and sub-committee assignments                      Board by-laws/policy documents</p>
Role of the trustee	<p>Overview of the role of the trustee. Topics to include:</p> <ul style="list-style-type: none"> <li>• Responsibility as a public official</li> <li>• Consensus making and goal setting</li> <li>• Guiding principles and codes of the board</li> </ul>
Trustee communication	<p>Overview expectations and standards for a) inter-trustee communication during and between meetings, trustee communication with college employees, and trustee communication with the public-at-large. Topics should include:</p> <ul style="list-style-type: none"> <li>• Communication protocols within the board</li> <li>• Communication protocols with college employees</li> <li>• Meeting protocols/rules of order</li> <li>• Public comment policies/standards</li> </ul> <p>Board agendas and minutes                      Board meeting calendar                      Meeting rules of order</p>
Mentoring	<p>Assign an experienced trustee to mentor new trustees                      Facilitates intra-board relationship building</p>

## Phase 2: Community College Essentials

After an initial orientation on what and how to be a trustee, trustees need to possess a common core of foundational information on the community college sector and its history and traditions in the state context. Most of the community college essential information may be best delivered statewide and organized by IACCT in consultation with the IDOE.

Phase 2: Community College Essentials	
Historical roots	Understand the history and development of community colleges nationally and in Iowa. <ul style="list-style-type: none"> <li>• History of community colleges in the U.S.</li> <li>• History of community colleges in Iowa</li> <li>• The role and mission of community colleges</li> </ul>
State higher education structures	Understand the structure of higher education in Iowa and the responsibility/charge of each agency/organization: <ul style="list-style-type: none"> <li>• Iowa Department of Education</li> <li>• State Board of Education/Community College Coordinating Council</li> <li>• Iowa College Aid</li> <li>• Iowa Association of Community College Trustees</li> <li>• Iowa Association of Community College Presidents</li> <li>• Iowa Board of Regents</li> <li>• Iowa Association of Independent Colleges and Universities</li> <li>• Iowa Workforce Development</li> <li>• Iowa Economic Development Authority</li> </ul>
State code and administrative rules	State code for community colleges (Iowa Code chapter 260C) State accreditation Other relevant state codes and administrative rules <ul style="list-style-type: none"> <li>• Open meetings</li> <li>• Public records</li> <li>• Ethics</li> </ul>
State-level fiscal issues	The state funding formula for state general aid Additional state funding sources
Understanding community needs	Information about community trends, demographics, and education needs Local workforce and economic needs
Statewide community college activity	State leadership and affinity groups State workforce initiatives Statewide initiatives and collaborations The statewide economic impact of community colleges
Commonly used terms and acronyms	Create an acronym and definition guide

## Phase 3: Institutional Knowledge

Building upon core community college knowledge, new trustees necessitate a deep dive into the internal workings of their community college. However, it is important and helpful for new trustees to possess the broad, common framing of the mission and role of the community college in the sections above first. Institutional knowledge is likely the most time-intensive and content-heavy phase of new trustee orientation. Most institutional knowledge orientation is best delivered and facilitated at the local level by a combination of the board chair, board secretary, CEO, and other senior leaders.

Phase 3: Institutional Knowledge	
Role of the president	Relationship with trustees Meet with the president
Organizational structure	History of the local community college College mission, vision, and value statements College culture College governance structures Key ceremonies and events Equity, diversity, and inclusion Organizational chart A roster of key personnel Internal governance and policy documents Meet with Vice Presidents to discuss their areas Meet with other faculty, staff, and students to understand college culture Calendar of key events and dates
Institutional planning	Major trends and issues Student demographics Student success/performance goals, measures, and data Strategic plan Annual report Enrollment reports
Academics	Education program offerings (credit and non-credit) Program and college advisory committees Accreditation process Accreditation report Catalog
Students	Student support services Student activities Athletics
Internal budget guidelines, policy, and process	Fiscal priorities Fiscal measures Revenues Expenses General fund Debt service Enrollment trend impact Employee benefits cost Audit controls Mil levies Bond referendums Meet with CFO to review financial documents
Foundation/fundraising	Overview of fundraising efforts The role of trustees in fundraising Ongoing capital campaigns
Human resources	Employee demographics Collective bargaining agreements Employee benefits
Facilities	Tour campus facilities Capital projects Campus master plan

## Phase 4: Advocacy Essentials

Advocacy is a critical role of trustees. However, trustees need to understand the board’s role, the common mission of the community college sector, and the inner workings of their institution before they can be strong and effective advocates for their institution and community colleges in Iowa. Many of the knowledge and skills required for effective advocacy necessitates a deep understanding of the complex relationships that their community college has with state and national stakeholders. Advocacy orientation is best organized by IACCT and delivered through a blend of IACCT and local board actions.

Phase 4: Advocacy Essentials	
Policy issues and trends	State and national
Legal issues	State and national
State legislative process	State and national
State legislative advocacy	The who, what, and where. The role of the trustee
Community college advocacy	Talking points to help be advocates for the college in the community Connections to community and region <ul style="list-style-type: none"> <li>• Other educational institutions (higher education and K-12)</li> <li>• Business/industry partners</li> <li>• Locally-elected officials</li> </ul> Community organizations

## Phase 5: Ongoing Education

Trustee education is ongoing. While trustee training starts at orientation, it should be ongoing through trusteeship to stay abreast of issues, trends, and policy developments. Ongoing education should utilize resources, conferences, events, and opportunities at the local, state (e.g., IACCT, IDOE), and national levels (e.g., ACCT). Ongoing education should cover a broad array of organizational and student topics. Trustees should engage in regular self-evaluation both individually and as a board activity to identify gaps in knowledge and understanding.

Phase 5: Ongoing Education	
Effective board governance	Trends and issues
Policy review	<ul style="list-style-type: none"> <li>• Student success</li> </ul>
Policy development	<ul style="list-style-type: none"> <li>• Workforce needs</li> </ul>
Community representation	<ul style="list-style-type: none"> <li>• Educational quality</li> </ul>
Board self-evaluation	<ul style="list-style-type: none"> <li>• Institutional effectiveness</li> </ul>
Board goal-setting	<ul style="list-style-type: none"> <li>• Accountability</li> </ul>
Conflict management	<ul style="list-style-type: none"> <li>• Equity, diversity, and inclusion</li> </ul>
Effective meetings	<ul style="list-style-type: none"> <li>• Innovative teaching and learning</li> </ul>
Strategic planning	<ul style="list-style-type: none"> <li>• State and national legislative and policy developments</li> </ul>
Supporting continuous improvement	<ul style="list-style-type: none"> <li>• Community, regional, and state trends and issues</li> </ul>
Fiscal projections and conditions	<ul style="list-style-type: none"> <li>• Technology and security developments</li> </ul>
Facilities planning	<ul style="list-style-type: none"> <li>• Legal and regulatory changes</li> </ul>
Human resource issues	<ul style="list-style-type: none"> <li>• Free speech</li> </ul>

## Conclusion and Recommendations

New trustee orientation is commonly facilitated by a combination of the board chair, board secretary, and college president. Orientation commonly extends throughout the first year of trusteeship. New trustees are oriented through a blend of document reading, regular meeting attendance, campus visits, orientation sessions, and mentorship. The goal of new trustee orientation is to gain a stronger sense of the college history, traditions, culture, programs, services, and the policy role of trusteeship. It is recommended that IACCT use this white paper to facilitate the development of a recommended checklist for new trustee orientation that each college can customize to their local context. These actions will strengthen new trustee development, reduce effort duplication, and improve common understandings statewide. IACCT should also collaborate with the IDOE to determine topics that may be best organized and delivered through statewide new trustee development opportunities and communicate the specific topics and intended timing of sessions to local board chairs before they plan the orientation of newly elected trustees.

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