

# Tips for Successful Trustee Orientation



## What do new trustees need?

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. Researchers from Iowa State University conducted an extensive, national document review research process to inform best practices for local and statewide orientation.

New trustee orientation is commonly facilitated by a combination of the board chair, board secretary, and college president that 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.

## Trustees Need Essential Board Information

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.

## Suggested Reading

Oath of office | Conflicts of interest | Disclosures | Meeting & events calendars | Trustee roster & contact info | Key college personnel roster | Board leadership positions | Sub-committee assignments | Board by-laws & policy documents | Board agendas and minutes | Meeting rules of order

## Suggested Activities

Walk through electronic file access | Meet with experienced board member

## Trustees Need Education Before Election

Board training should begin before an election by means of 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 provide all candidates with a foundational knowledge of the college. Candidate education is best delivered locally through board-organized events and actions.

## Before Election Filing Deadline

Candidate education may take the form of public informational meetings for interested individuals to better understand community college board service, duties, and expectations.

## After Election 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.

## Suggested Discussion Items

Travel & reimbursements | Iowa Code section 260C.14 (board authority) | Responsibility as a public official | Consensus making & goal setting | Guiding principles, codes of board | Communications protocols within board & with college employees | Meeting protocols/rules of order | Public comment policies/standards

## Did you know?

Iowa's Community Colleges are served by 124 Trustees statewide. Trustees oversee the largest Higher Education system of the state, serving the equivalent of nearly 17% of Iowa's population or 532,526 students in credit and non-credit coursework in FY2021.

## Trustees Need Essential Institutional Information

New trustees need a deep dive look into the internal workings of their community college. 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.

### Suggested Reading

College mission, vision & value statements | Calendar of key events & dates | Organizational chart | Student demographics | Student success/performance goals, measures & data | Strategic plan | Annual report | Enrollment reports | Education program offerings (credit & non-credit) | Program and college advisory committees | Revenues | Expenses | General fund | Debt service | Accreditation report | Catalog | Employee demographics | Collective bargaining agreements | Campus master plan

### Suggested Discussion Items

History of the local community college | Role of president & relationship with trustees | College culture | College governance structures | Equity, diversity and inclusion | Major trends & issues | Accreditation process | Student support services | Student activities | Athletics | Fiscal priorities & measures | Enrollment trend impact | Employee benefits cost | Audit controls | Mill levies | Bond referendums | Overview of fundraising efforts | Role of trustees in fundraising | Ongoing capital campaigns | Capital projects

### Suggested Activities

Meet with the president | Meet with vice presidents to discuss their areas of expertise | Meet with other faculty, staff, & students to understand college culture | Meet with CFO to review financial documents | Tour campus facilities

## Trustees Need Ongoing Education

Trustee education is ongoing. While trustee training starts at orientation, it should be ongoing throughout 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 to identify gaps in knowledge and understanding.

# HIGHLIGHTS

- Trustees need education, training, and information during every stage of their trusteeship including before election.
- An experienced board member should be assigned to each new trustee to aid with the transition process and assist with board information.
- Senior leaders, the board chair, board secretary, and CEO should all assist in sharing institutional knowledge.

Smith, D.A. & Thornton, Z.M. (2022). *Best practices for orienting new community college trustees [White paper]*. Iowa State University.