

New Trustee Onboarding Training Topics – First 30 Days

WHAT	WHY	BY WHOM				HOW
What I Need to Know	Why this is important	President's Office	Board Chair	Self-Guided	Trustee Assoc.	Resources/Methods/Actions
<u>College Overview</u> <ul style="list-style-type: none"> • Student demographics, characteristics, facts • Faculty and staff demographics • Programs, certificates, courses of study offered 	<ul style="list-style-type: none"> • Understand who the college serves and how. 	X				<ul style="list-style-type: none"> • College marketing materials • Fast Facts • SBCTC Field Guide • College website • Accreditation self-study and reports • Annual report
<u>Campus</u> <ul style="list-style-type: none"> • Where we meet and where to park • Key building and office locations • Planned and needed facility improvements 	<ul style="list-style-type: none"> • Not to be lost or late getting to meetings 	X				<ul style="list-style-type: none"> • Campus map • Campus tour • Facility projects • Campus master plan
<u>Leadership</u> <ul style="list-style-type: none"> • Leadership team members • How the college is organized • Who is accountable for what • Board of Trustees members 	<ul style="list-style-type: none"> • Understand role with the college • Confidence in communication 	X	X			<ul style="list-style-type: none"> • Organizational charts • Contact lists
<u>Getting Started</u> <ul style="list-style-type: none"> • Key meetings & events to attend • Per Diem, travel and expense • College systems • Training for trustees • Information about board meetings 	<ul style="list-style-type: none"> • Getting set up to be a trustee • Working within the college's administrative structure 	X				<ul style="list-style-type: none"> • Email address/ IT • Business cards • Parking pass • Photo and bio for website • Calendar & invitations • Most recent board packet • Travel & expense policies

New Trustee Onboarding Training Topics – First 30 Days

WHAT	WHY	BY WHOM				HOW
What I Need to Know	Why this is important	President's Office	Board Chair	Self-Guided	Trustee Assoc.	Resources/Methods/Actions
<u>Role of the Trustees – General</u> <ul style="list-style-type: none"> • Role of community college trustees differ from the role of board members in other organizations • Policy governance: difference between policy and management • Trustee's role vs. president's role • Public sector vs. private and nonprofit sectors 	<ul style="list-style-type: none"> • Understand how a public official is different from a private citizen 		X			<ul style="list-style-type: none"> • Trustee policy manual • ACT New Trustee Orientation; Other reading material • ACT resource website • "Trustee Responsibilities and Working Relationships" • "ACCT Governing Board Roles and Responsibilities" • "ACCT Trusteeship 101" • "What I Wish I'd Known as a New Trustee" podcast by Rosaelena O'Neil
<u>Scope of the Trustee Commitment</u> <ul style="list-style-type: none"> • Board meetings: preparation and attendance • Additional trustee meetings • Community events • College events • Local, state and national conferences 	<ul style="list-style-type: none"> • Understand what is expected of you - time and level of participation 	X	X			
<u>Communication</u> <ul style="list-style-type: none"> • Board communications with each other, the president and the college • How to get questions answered • Who speaks about the college 	<ul style="list-style-type: none"> • Understand communication constraints • Ensure compliance with open government requirements • Understand whom to talk with about what 	X	X			

New Trustee Onboarding Training Topics – First 30 Days

WHAT	WHY	BY WHOM				HOW
What I Need to Know	Why this is important	President's Office	Board Chair	Self-Guided	Trustee Assoc.	Resources/Methods/Actions
<u>Ethics</u> <ul style="list-style-type: none"> Code of ethics Open meetings law Public records Conflict of interest Personal financial disclosures (F-1 filing) 	<ul style="list-style-type: none"> Avoid trouble for you and the college Use your position of authority appropriately 	X	X	X		<ul style="list-style-type: none"> ACT website "Attention New Trustees: This Episode is For You," by Jeff Advokat ACCT Guide to Ethical Governance Annual PDC F-1 Personal Financial Affairs Statement Governor's website Documents from AG's office
<u>The Basics</u> <ul style="list-style-type: none"> Members of the board Meeting schedule Participate in community Maintain integrity Expectations Financial commitment Tour the campus Spread the word to inspire others Meet faculty 	<ul style="list-style-type: none"> To understand and meet obligations and commitments as a trustee 	X	X			<ul style="list-style-type: none"> Board contact list Board calendar
<u>Duties and Responsibilities of the Board</u> <ul style="list-style-type: none"> Who speaks for the board How the board gets its work done Board packet and typical agenda Who's in the room Role of the board chair Robert's Rules of Order 	<ul style="list-style-type: none"> Understand what you are being asked to do 		X			<ul style="list-style-type: none"> ACT New Trustee Orientation ACT website Board operating procedures Recent board packet Robert's Rules of Order Modified Robert's Rules of Order

New Trustee Onboarding Training Topics – First 30 Days

WHAT	WHY	BY WHOM				HOW
What I Need to Know	Why this is important	President's Office	Board Chair	Self-Guided	Trustee Assoc.	Resources/Methods/Actions
<ul style="list-style-type: none"> Motions, voting, quorums Working as a team 						
<u>Work of the Board</u> <ul style="list-style-type: none"> Timing of board actions throughout the academic year College and community events Board chair duties 	<ul style="list-style-type: none"> Know what to be prepared for and when Reserve important dates on calendar 	X				<ul style="list-style-type: none"> Board calendar Schedule of college and community events