

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 |
| <p><u>College Overview</u></p> <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 services 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 |
| <p><u>Campus</u></p> <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 |
| <p><u>Leadership</u></p> <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 |

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| <p><u>Getting Started</u></p> <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 trustee • Working within 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 |
| <p><u>Role of the Trustees – General</u></p> <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 |
| <p><u>Scope of the trustee commitment</u></p> <ul style="list-style-type: none"> • Board meetings: preparation and attendance • Additional trustee meetings • Community events • College events | <ul style="list-style-type: none"> • Understand what is expected of you - time and level of participation | X | X | | | |

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| <ul style="list-style-type: none"> Local, state and national conferences | | | | | | |
| <p><u>Communication</u></p> <ul style="list-style-type: none"> How to get questions answered How to communicate with other trustees Who speaks about the college | <ul style="list-style-type: none"> Understand communication constraints | X | X | | | |
| <p><u>Ethics</u></p> <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 |
| <p><u>The Basics</u></p> <ul style="list-style-type: none"> Members of the board Meeting schedule Participate in community Maintain integrity Expectations | <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 |

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| <ul style="list-style-type: none"> Financial commitment Tour the campus Spread the word to inspire others Meet faculty | | | | | | |
| <p><u>Duties and Responsibilities of the Board</u></p> <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 Motions, voting, quorums Working as a team | <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 |
| <p><u>Work of the Board</u></p> <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 |

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| <p><u>Communication</u></p> <ul style="list-style-type: none"> Board communications with each other, the president and the college | <ul style="list-style-type: none"> Ensure compliance with open government requirements Understand whom to talk with and about what | X | X | | | |