

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

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

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

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<ul style="list-style-type: none"> <li>Motions, voting, quorums</li> <li>Working as a team</li> </ul>						
<p><b><u>Work of the Board</u></b></p> <ul style="list-style-type: none"> <li>Timing of board actions throughout the academic year</li> <li>College and community events</li> <li>Board chair duties</li> </ul>	<ul style="list-style-type: none"> <li>Know what to be prepared for and when</li> <li>Reserve important dates on calendar</li> </ul>	X				<ul style="list-style-type: none"> <li>Board calendar</li> <li>Schedule of college and community events</li> </ul>
<p><b><u>Trustee Equity Topics</u></b></p> <ul style="list-style-type: none"> <li>Community demographics: past, current, future</li> <li>Student demographics: past, current, future</li> <li>Faculty and staff demographics: past, current, future</li> </ul>	<ul style="list-style-type: none"> <li>Trustees and boards lead with racial equity and anti-racism representing the entire community both now and trends for the future</li> <li>Trustees and boards understand how well their district is meeting the needs of the entire community it serves</li> </ul>	X		X		<ul style="list-style-type: none"> <li>Community statistical reports available from your president's office and/or census bureau <a href="https://www.census.gov/">https://www.census.gov/</a></li> <li>District statistical reports from your president's office or Field Guide <a href="https://www.sbctc.edu/about/facts-publications/field-guide-2022/default.aspx">https://www.sbctc.edu/about/facts-publications/field-guide-2022/default.aspx</a></li> </ul>

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<ul style="list-style-type: none"> <li>• DEI initiatives at the district (ODEI, faculty, staff, admin, student)</li> </ul>	<ul style="list-style-type: none"> <li>• Trustees are conversant in the terms and language of diversity, equity, and inclusion</li> </ul>	X	X	X	X	<ul style="list-style-type: none"> <li>• Trustee Recruitment and Selection Handbook  <a href="https://www.sbctc.edu/resources/documents/about/trustees/trustee-recruitment-and-selection-handbook-draft-as-released.pdf">https://www.sbctc.edu/resources/documents/about/trustees/trustee-recruitment-and-selection-handbook-draft-as-released.pdf</a></li> <li>• Equity, Diversity, and Inclusion Research and Resources  <a href="https://www.sbctc.edu/about/education/research-resources.aspx">https://www.sbctc.edu/about/education/research-resources.aspx</a></li> <li>• Check your district's Office of Diversity, Equity, and Inclusion web site</li> </ul>