

BOARD OF TRUSTEES ORIENTATION

I. BOARD PRESIDENT RESPONSIBILITIES

The president of the Board (or designee) has a responsibility in onboarding the new trustee and ensuring that the new trustee fulfills orientation and continued professional development classes. The Board President's duties include:

- Welcomes new trustees and participates in their orientation
- Helps plan agendas, retreats, and study sessions for the board with the Chancellor
- Participates actively in trustee education activities
- Encourages all trustees to attend conferences and seminars
- Asks for reports and evaluations of trustee development activities

II. CHANCELLOR (CEO) RESPONSIBILITIES

The Chancellor (CEO) plays a key role and has the responsibility for implementing the orientation. The CEO is responsible for organizing agendas, retreats, and study session in consultation with and under the direction of the Board President. The CEO (or designee) informs the board of conferences to ensure trustees' continued professional development. The CEO's duties include:

- Welcome new trustee
- Plan orientations and ensure new trustees attend trustee orientation
- Develop a comprehensive packet of district materials and SMCCCD handbook
- Plan retreats and study sessions in consultation with the board president
- Encourage trustees to attend conferences and accompany them to events
- Invite trustees to community and college-wide events
- Mentors new trustees

III. BOARD CLERK RESPONSIBILITIES

Under the direction of the CEO, the board clerk serves to organize board meetings, provide scripts to the Board President for running the board meetings, helps new trustees strengthen their links to the external community and public, and manages their calendars. The Board Clerk's duties include:



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- Arrange for new trustees to be invited to and attend community events or meetings with key community people and be sure they are introduced as new trustees
- Invite them to attend a Foundation board meeting
- Coordinate their professional development activities
- Provide information about trends and educational needs in the community
- Provide “talking points” to help new trustees be knowledgeable advocates for the district
- Maintain ongoing communication

IV. AFTER THE ELECTION OR APPOINTMENT

CEO is responsible for the following actions :

- Inform the League of the results of the election or appointment of trustee
- New trustees will receive a welcome letter and educational materials, and will be added to the mailing lists
- Ensure the new trustee completes any required documents (conflict of interest and from human resources), sits for the official photograph, and understands travel and other expense procedures
- Arrange for new trustees to attend the League’s Effective Trusteeship Workshop in Sacramento.
- Ensure that the CEO and/or Board Chair or other trustees accompany the new member(s)
- Arrange for the new trustee to enroll in the League’s Excellence in Trusteeship Program
- Design a three hour orientation session with all new trustees to include in attendance: Board President; Chancellor/CEO; College Presidents; Executive Vice Chancellor; Vice Chancellor of Educational Programs; Executive Director of Communication and Government Relations; Chief Financial Officer; Chief Human Resources Officer; District Academic Senate President; and Bargaining Unit Presidents.

V. ORIENTATION SESSION

The goal of the orientation is to provide comprehensive information about the board and district with all appropriate individuals in attendance. Below are basic items to cover in the orientation session with a specific focus on “what is the Board Member’s role?” highlighting the difference between the Board’s *policy role* and the CEOs *operational role*.

A. TECHNICAL

- Board policy manual and use of BoardDocs (log in, etc)
- HR materials including insurance, payroll
- Board calendar
- Communication protocols and other guidelines (BP and practice)
- SMCCCD Trustee handbook + Binder of District/ College information
- Schedule campus tours and visits to major programs



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- Provide a roster, with photos, of key district personnel and constituent leadership
- Set up a District email address and include BoTs in routine communication

B. BOARD MEETINGS

- Board meeting procedures (e.g., rules of order)
- Agendas and minutes
- Closed session (HR or Legal)
- Public Comments (BP)
- Communication Protocol
- Decorum
- Voting protocol
- Open meeting legal/ ethical constraints (Legal or HR)
- Conflicts of interest (Legal or HR)
- Role in collective bargaining (Legal or HR)
- Brown Act (HR or Legal)

C. DISTRICT AND COLLEGES INFORMATION

- District and college mission, history and culture
- District and college organization
- Student success and learning outcomes definitions
- The district's educational programs and services
- District budget, budgeting processes, constraints and resources
- Plans, major issues and trends
- Campus layouts, off-campus sites and facilities plans
- Institutional and student success data

D. CALIFORNIA COMMUNITY COLLEGE SYSTEM

- History and mission of community colleges
- Structure of higher education in California
- Bilateral Governance

E. EACH VC/PRESIDENT/ LEADER PROVIDE AN OVERVIEW OF THEIR AREAS

- Mission statement
- Strategic and master plans
- Accreditation reports (what is accreditation, what is the Board's role)
- Budget Process and Reports



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- Overview of Governor's budget
- Fiscal projections and conditions
- Audits
- Anti-racism / Equity initiatives
- Current initiatives (e.g., Free College, Student Housing)
- Student Success and institutional effectiveness data summaries
- Institutional effectiveness and key performance indicators
- Program reviews and implications for planning and budgeting
- Collaborations with the community, business, and industry
- Strategic and long-range planning processes and documents
- Educational programs and services
- State and national policy issues and trends
- Community and Region (e.g., relationships with other educational institutions, local governments and business; and social, cultural and economic influences)
- College Presidents provide campus overview
- Discuss processes for participatory decision-making and guidelines for communicating with staff (PG leaders)
- AB 1725 (PG Leaders)
- Bilateral Governance
- State initiatives
 - AB 705/ 1705
 - SCFF
 - Vision 2030
 - Key contents and constraints of Education Code and Title V
 - Glossary of terms (back of handbook)
 - 75/25
 - FON
 - 50% Law
- Board Goals
- Board Evaluation
- Effective Board Governance
- Concept of board as a unit
- Board roles and responsibilities
- Related laws and regulations
- Board Policies and Administrative Procedures
- Relationships with and support from the CEO and Board Clerk
- Trusteeship
 - Code of ethics or standards of practices; conflicts of interest
 - Communication protocols with staff and the community
 - Working as a team; collaboration; influence



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F. STUDY SESSION WITHIN TWO MONTHS OF TRUSTEE'S ONBOARDING

- Approaches to and dimensions of effective board governance
- Board policy review and development
- Board self-evaluation processes and criteria
- Setting and achieving board goals
- Collaboration, teamwork and conflict management
- Effective meetings and agenda construction
- Ethics and standards of practice
- Mission and Vision
- Agenda Topics

G. CONTINUED PROFESSIONAL EDUCATION

- Effective Trustee two day workshop
- Annual Legislative Conference
- Annual Trustees Conference
- CCLC Excellence in Trusteeship Program Certification covering nine competencies
- Accreditation [A]
- Board/CEO Relationship [BC]
- Board Evaluation [BE]
- Brown Act Training [BA]
- Diversity, Equity, Inclusion, and Accessibility [DEIA]
- Ethics Training [E]
- Fiscal Responsibilities [FR]
- Governance [G]
- Student Success [SS]

H. SUGGESTIONS FOR INCLUSION IN NEW TRUSTEE BINDER

- <https://ccleague.org/sites/default/files/images/commonlyusedterms23.pdf>
- https://ccleague.org/sites/default/files/images/different_jobs_different_tasks.pdf
- SMCCCD Mission, Vision, Goals and student data
- Colleges Mission, Vision and student data
- SMCCCD Plans
 - Strategic and Master Plan
 - Board Policies (Chapters 1 and 2)
- CCLC Board Ethics Resource Guide, updated 2020
- CCLC Board Focus
- CCLC Board Self-Evaluation Resource Guide, 2015



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- CCLC Introduction to Fiscal Responsibilities, updated 2023
- CCLC Guide for Peer Review Team Members (ACCJC Publication)
- CCLC Trustee and Board Education, 2022 (formerly Orientation and Development for CC Trustees)
- CCLC Trustee Handbook, updated 2022
- CCLC Trusteeship – Tasks, Knowledge and Skills, revised 2018

I. SMCCCD NEW TRUSTEE ORIENTATION CHECKLIST

- SMCCCD Trustee Handbook
- Authority
- Code of Ethics / Standards of Practice
- Brown Act
- Duties and Responsibilities
- Fiscal Responsibilities
- Participatory Governance
- Board/CEO Roles
- Understand board role in :
 - Policy
 - Planning
 - Budget
 - Finance
- Meetings of the Board
 - Agenda expectations and responsibilities
 - Communication with Chancellor
 - Robert's Rules
 - Preparing for meeting
 - Meeting protocol
 - Running effective meetings : responsibilities and expectations
 - Consent calendar
 - Quorum and voting
 - Closed session
- Board Development
 - New Trustee Orientation Certificate
 - Professional development
 - Board Goals
 - Board Retreats and Study sessions
 - Board Self Evaluation
 - Chancellor Evaluation



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This checklist certifies that Trustee _____ has completed the SMCCCD new trustee orientation process.

The next step is to attend the CCLC Excellence in Trusteeship program to obtain certification which meets the ACCJC accreditation requirement for continuing board development.

Signatures:

SMCCCD Trustee

SMCCCD Board President

SMCCCD Chancellor