

CONTINUING EDUCATION & ORIENTATION



Doubling the Numbers by 2020:
Meeting the Challenges of Postsecondary Reform

BOARD BREAKFAST ROUNDTABLE DISCUSSIONS

Issue:

Postsecondary education trustees and regents have varied backgrounds and are often members of other organizational boards. Colleges and universities are complex institutions with traditions, such as tenure, that are unfamiliar outside the sector. Even those members with significant business experience and those who have served on other types of boards may be surprised at how much there is to learn about postsecondary education in general and the operations of their institution in particular. There are new acronyms to learn, new committees to serve on, and new rules and bylaws to comprehend.

Best Practices:

The Association of Governing Boards of Universities and Colleges (AGB) offers some ideas for institutional orientation best practices. The orientation program should ideally consist of two sessions – one devoted to trusteeship issues and one devoted to learning about the institution.

- Before the first session on trusteeship, new board members should receive briefing materials on bylaws, board policies, historical financial analyses, information about board committees, and writings about trusteeship. Besides new trustees, the board chair or vice-chair, key leaders, and the university president should be present. At the session, new members may be given a job description, a statement of individual trustee responsibilities, and information about other board members. The session concludes with a tour of part of the campus.
- The second session should focus on mission, strategic plans, academics, finances, organizational structure, enrollment management strategies, student affairs, and more. The president and board chair or other senior board member should be present. The chief academic officer should describe academic programs and policies. Faculty and leaders can explain the issues of concern to professors and staff. The chief financial officer should explain the financial information. The dean of students and/or student leaders can describe student affairs. The session concludes with the remainder of the campus tour.
- After these initial orientation sessions, there should be opportunities for continuing education for board members. University boards may assign new members a mentor who can provide information on an ongoing basis throughout the first year and beyond. Educational sessions should be a regular part of board meetings. Also, boards should schedule periodic retreats at which major policy issues are discussed apart from the urgent pressures and preemptive agendas of regular business sessions. Trustees should be expected to attend regional and national workshops that address current and emerging issues facing boards. The annual Governor's Conference on Postsecondary Education Trusteeship, which provides an overview of national and state trends in postsecondary education, is a valuable source of professional development. In addition to Web resources and reports, the AGB publishes a bi-monthly magazine entitled *Trusteeship* that provides information on trends, issues, and practices in postsecondary education.

Questions for Boards to Consider:

- Is a comprehensive board orientation program for new board members in place?
- Has the board developed a continuing education schedule? How are the topics determined?
- How can board members maintain a proper balance between being fully informed and diligent in their service on the one hand, and keeping the inherent ambiguities of trusteeship in perspective on the other hand?
- When did the board last assess its own performance? What improvements did the board make as a result? How have self-assessment results been incorporated into trustee orientation and continuing education?

Resources:

- Association of Governing Boards of Universities and Colleges (AGB) (www.agb.org).
- Council on Postsecondary Education (www.cpe.ky.gov).
- Ingram, Richard T. *New Trustee Orientation: A Guide for Public Colleges and Universities*. Washington, D.C.: Association of Governing Boards of Universities and Colleges, 2003.
- Wilson, E.B. "The Learning Curve of Trusteeship." *Trusteeship*, vol. 13, no. 1, pp. 8-13, January/February 2005.

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