**Assessing Trustee Knowledge and Skills**

Individual trustees may be asked to assess their knowledge and skills in the following areas to determine needs for trustee education and development.

A suggested rating scale is: *3 – I am very confident in my knowledge and skills*; *2 – I have some knowledge and skills*; and *1 – Need more information and resources*.

**I. Board Member Responsibilities**

1. Board and trustee roles and responsibilities for California community colleges
2. Working collaboratively on the board; what it means to be “a unit”
3. How to contribute ideas and influence board direction
4. Board self-evaluation requirements and processes
5. Brown Act provisions, including open and closed meeting requirements
6. Rules for running and participating in meetings (basic parliamentary procedure)
7. Board agendas and how to place items on the agenda
8. Differentiating between board policy and administrative procedure
9. Understanding board policy development; the policy making process
10. Defining and avoiding micromanagement
11. Identifying policy implications and values in issues
12. Laws and regulations related to conflicts of interest
13. Local codes of ethics/standards of practice for trustees
14. Upholding the board’s code of ethics and addressing violations

**II. Board and CEO Relationships**

1. The differences between board and CEO roles and responsibilities
2. How to effectively delegate to the CEO
3. CEO compensation and contract provisions
4. CEO evaluation tools and processes
5. Maintaining a positive relationship and providing support for CEO’s leadership
6. Communication protocols with the CEO

**III. Community and State Relations**

1. Social, economic, and business trends and needs in the communities
2. Connecting with key community and business leaders and other external stakeholders
3. Connecting with legislators and the political process
4. Advocacy role and strategies
5. Communication protocols with community members
6. Representing the district with the media

**IV. Mission and Student Success**

1. Role and unique nature of community colleges
2. History and culture of the college(s)
3. District mission, vision, and values
4. Board role in mission and setting priorities
5. Student success definitions, goals and metrics
6. Board policy on academic affairs and student services
7. Board policy and processes that assure the quality of educational programs
8. Accreditation standards and the board’s role in accreditation
9. District and college plans (e.g. long-range, master, educational plans)
10. Program review processes and use in planning
11. How planning and budgeting are integrated
12. How to use data and information to make decisions (operate in a “culture of evidence”)

**V. Employee Relations and Human Resources**

1. Organizational structure and lines of accountability/responsibility
2. Laws regarding participation of faculty, staff, and students in decision-making
3. The district’s local decision-making process and structure
4. Board policies and roles related to human resources
5. Protocols for communicating with employees
6. Collective bargaining processes, parameters, and constraints
7. General compensation and contract provisions
8. Long range implications of employee group contracts on budget
9. Hiring, evaluation and other human resources policies

**VI. Fiscal and Facilities Responsibilities**

1. Board responsibilities for financial stability
2. Long-range financial planning
3. Board policies in business and fiscal services
4. State constraints and requirements for district budgets
5. The state budget development process
6. Understanding the district’s budget development process and document
7. Revenue sources and expenditure categories
8. Understanding reserves
9. Reading and evaluating financial statements
10. Understanding the audit report
11. District’s accountability to state government
12. District foundation
13. Grants and other external funding resources
14. Facilities policy development and monitoring
15. Funding for facilities (current and planned) including bonds
16. Maintenance and operation needs and plans
17. Property acquisition and management
18. Building design and construction