

Board Planning

Taming The Technological Tiger

by Barbara Vineyard and Kevin Ramirez



Kevin M. Ramirez
District Superintendent and
President
Sierra Community College

Dr. Casey Green of Claremont Graduate University astutely observed recently that information technology and the Information Age comprise an “accidental revolution: unanticipated, unplanned and unprepared [for].” As a board member and district superintendent/president, we are confident that our counterparts elsewhere have had frequent occasion to appreciate Dr. Green’s incisiveness. If paralyzed with anxiety after receiving reports where the presentation includes such terms as Moore’s Law, digitization, asynchronous learning, broadband, technology infrastructure, “...and now, please, approve our expenditure,” we hope the following may be of some help.



Barbara J. Vineyard
Member of the Board of Trustees
Sierra Community College

It is our belief that proper board planning perspective regarding technology development and implementation resides in policy development. We accept the premise that technology is here to stay and an inevitable component in much community college decision-making. Our educational endeavors will never return to a technologically vacant landscape.

At Sierra College, we have developed an “ends policy” articulated in our Vision 2007 Policy. Within the policy are seven key indicators and strategic directions. Inherent in this planning strategy is the requirement to utilize technology as a tool for success

and excellence. Similarly, as the district establishes Institutional Goals (three-year) and Annual Work Plans to support these strategic directions, technology implementation and acquisition are constantly incorporated. These policy and planning elements thus become our compass and sextant for subsequent decision-making. It is important that such policies, developed by the board, be broad enough to allow staff and/or consultants the necessary leeway to develop implementation strategies as new technologies evolve. It would be foolish indeed to name a system, or even a specific end result, if doing so should thereby tie the hands of those who undoubtedly have more expertise than the board or the CEO. Such policy should be a Travel Plan with much flexibility: the board should neither decide

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which road to take, nor even whether to drive or fly, rather it should provide identifiable destinations and an adequate budget for necessary expenditures.

Policy development is only one element of our board and district's efforts to infuse technology throughout our mission. The other three legs on our table include masterplanning, budgeting and training.

Masterplanning in the world of technology will lose its freshness after two years, given the rapidity of technological change (Moore's Law). Thus our board and superintendent/president have insisted on a technology plan reflecting consensus and broad-based participation from employee stakeholders. As with any substantial decision and planning document, Sierra College expects collaboration to be used as an integral tool in the development process: stakeholders absolutely must be involved from all campus segments, classified, faculty and management. The resultant document must articulate in "everyday language" both collaborative

guidance and the larger vision and why we are here. Boards should require an annual, high-level review of progress toward the vision as well.

Managing the daunting exponential growth of the tiger of technology should properly be done in more predictable fashions than those for which most districts currently budget. With significant instructional capital outlay block grants since 1996, most campuses have merely backfilled pre-existing needs. Such reactive, quick-fix funding initiatives do not account for maintenance, support, or replacement needs. The Board of Trustees at Sierra College has requested a special fund account to ensure scheduled re-

placement for capital needs. Utilizing a "sinking fund" concept, with annual replenishment, is only one means to consider. The human resource needs for maintenance and support are a more challenging asset to acquire, given intensely competing needs for other personnel requirements associated with growth and change, including new full-time faculty and other classified positions.

A profound need within the technology revolution itself, and a need which must be met by boards and CEOs, is also emerging. The training functions of our new technological acquisitions are absolutely essential in the development of a productive and effective workforce. A recently adopted staff development masterplan ensures every employee access to an array of training options, including self-paced, instructor-led, and peer-to-peer designs, all of which are both synchronous (scheduled) and asynchronous (at any time). Board perspectives on technology planning need to provide for such universal staff training, otherwise technology will become a specialized end in itself rather than a means to an end, an underutilized, expensive, unproductive investment.

"The art of progress is to preserve order amid change," observed Alfred North Whitehead, "and to preserve change amid order." Boards and CEOs will best serve their students, community, and districts if they look to the technological future with a high-level policy on how these new, sometimes intimidating, tools can be systematically integrated into planning and policy in order to achieve desired results. With an equally sharp eye on masterplanning, budgeting, and training, we believe technology can produce productive transformation and that "planning for technology" need not be considered oxymoronic.





Local Trustee Education Programs Highlights of Survey Results

By Cindra J. Smith

What are the most effective ways for trustees and boards to learn what they need to know to be good at their jobs? A survey was conducted by the League this summer asking districts to describe what they do to provide and support local trustee education. Fifty-six districts (79%) returned surveys. The results indicate a wide range of practices and levels of support for board education.

Those who responded to the statewide survey listed conferences as the most effective strategy, then board retreats, study sessions, and local trustee orientation in that order. Other strategies mentioned included written materials and publications (including use of the League's Trustee Handbook), regular communication with the CEO, one-on-one discussions with other board members, and mentoring new trustees.

Support for conference attendance is an important strategy for board education – almost all boards had at least two or three members who regularly attended conferences sponsored by the League (the Annual Trustee Conference, Trustee Orientation, Legislative Conference and Annual Convention). Two-thirds of those who responded had members who attended ACCT sponsored events.

Budgets for conference and travel varied widely among districts. Large districts with seven member boards averaged \$15,450 for conference and travel. Medium districts with seven member boards averaged \$12,500. And small districts with seven member boards averaged \$8,400.

All but two districts reported incorporating study sessions at board meetings, scheduling study sessions in lieu of board meetings, and/or having board retreats. Seventy percent used at least two of the three approaches. Study sessions at board meetings tended to address budget items and college programs and operations. Study sessions in lieu of board meetings generally focused on topics related to planning and budgeting. Retreats were used to set goals, discuss boardsmanship skills, conduct board self-evaluations, and strengthen board/CEO relations. Most districts used consultants to conduct or facilitate retreats.

Individual board members, the board as a whole, and the CEO are significantly involved in identifying needs for trustee education. Board education and development programs are designed by the CEO and, to a lesser extent, the board as a whole and the chair. However, implementing trustee education is usually the responsibility of the CEO, with some board chairs assuming some responsibility.

Other highlights of the survey include:

- One third of the districts have a written statement or policy regarding trustee education.
- 75% of the districts used the League's Trustee Handbook for local trustee education. Just over a third have a local trustee handbook.



Cindra J. Smith
Director of Education Services

New Trustees Share Their Experience

During the 1998 Annual Trustee Conference, 18 trustees who were in their first term participated in focus groups conducted by members of the League's Advisory Committee on Education Services. The interviews were conducted to identify the best educational strategies for new trustees. Highlights from the interviews are:

What do new trustees do to learn about their roles and responsibilities?

- *Attend the League's Trustee Orientation Workshop*
- *Attend formal orientation meetings organized by CEO*
- *Read the Trustee Handbook*
- *Meet with other trustees on their board, including formal or informal mentoring*
- *Get advice from trustees from other boards*
- *Use written materials and policy manuals as resources*
- *Attend board meetings*
- *Listen, listen, listen.*

The most helpful strategy was the League's Trustee Orientation, with some trustees stating it is worth attending more than once. Other excellent strategies are structured presentations with college personnel and conversations with other trustees. Mentoring is helpful as long as the mentor doesn't try to sway new trustees to their point of view.

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New Trustees Share Their Experience (continued)

What skills and knowledge are important?

- *The difference between policy and procedures*
- *How to stay at the policy level*
- *How to avoid micromanaging, but still know what is going on*
- *How to listen and stay objective*
- *The importance of working as a unit*
- *How to build trust and teamwork on the board and with the CEO*
- *How to have influence*
- *Fiscal issues and budgets*
- *Shared governance*
- *Brown Act and other legal constraints*
- *What community colleges are and should be*
- *How to best represent and link with the external community*

The best ways to get the skills and knowledge are through participating in discussions with knowledgeable people, attending conferences, and being involved in board retreats and study sessions. The opportunity to ask questions and discuss issues is also very important.

The interviews were conducted by Kris Chase, Trustee, Contra Costa CCD, Maria Nieto Senour, Trustee, San Diego CCD, Don Jenkins, Trustee, Rio Hondo CCD, and Stan Arterberry, Superintendent/President, Solano CCD.

Highlights of Survey Results (continued)

- Mentoring of new trustees, whether formal or informal, occurs in 1/3 of the districts.

Detailed results of the survey are available on the League's Website – <http://www.ccleague.org>. The League is using the information to develop resource materials to assist CEOs and boards design and implement local board education programs (available in December). We are asking that those districts that have written policies, local trustee handbooks, and mentoring for new trustees provide us with copies of related materials so that we may highlight good practices in the resources we provide.

Board and trustee education is important. The 1996 revisions to the accreditation standards require that boards have a program for new member orientation and governing board development. It is apparent from the survey that boards and districts are taking this mandate seriously and that boards themselves are making a commitment to learning and ongoing education.

Cindra Smith is Director of Education Services for the League, and is responsible for designing and coordinating trustee education programs. She also coordinates League on Call, which provides consulting services to districts.

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