



Trustee Orientation Is Only the Start Of Ongoing Education and Engagement

BY LOUIS R. CHARPENTIER

ORIENTATION PROGRAMS FOR NEW TRUSTEES are different in independent and public institutions, but they do share essential common elements. In both sectors, such programs must provide core information about the institution's history and traditions, current status and aspirations, and challenges and opportunities.

Orientation programs also must introduce the institution's governance structure and board members' responsibilities. This means that new trustees must understand their individual responsibilities as well as the board's collective obligations with respect to accountability and stewardship.

AGB's Board Basics series includes two valuable guides on trustee orientation that present principles for planning, executing, and evaluating successful orientation programs. What stands out is the admonition that orientation be a critical first step in trustee education and engagement.

A solid orientation should launch an ongoing relationship that benefits individual trustees, the board, and the institution. It should go beyond highlighting fundamental information to set the stage for the future. That is, it should be an opportunity for the board's leadership and the institution's administration to define their expectations.

In some ways, the orientation represents both an introduction to the possibility of a long tenure as a board member and a statement on how the institution plans to inspire productive and mutually beneficial board service.

Orientation alone, however, is insufficient to ensure well-informed trustees. It should be part of a larger framework of continuing trustee education and engagement in affecting the institution's present and future.

What does a commitment to continuing education mean in practical terms? Continuing education is intended to deepen and broaden trustees' knowledge of the institution's many facets. Over time, it also can help impart an appreciation of the campus's daily life.

A regular component of every board meeting should be a brief presentation devoted to an academic initiative, research program, or student-driven activity. These can be planned thematically

in the context of strategic priorities, highlighting in tangible ways how the institution is progressing in the achievement of its mission. They can illustrate—sometimes vividly—the positive impact and value of trustees' decisions.

Trustees also need to understand the higher education environment in all its complexities. They need to be informed about emerging trends and critical issues—and why these matter to trustees' work. Periodic formal seminars or information sessions, perhaps conducted by an expert from the faculty, can strengthen members' knowledge and enhance the board's effectiveness. It also may be helpful to hear periodically from outside governance experts on current practices, new thinking, and new requirements.

Continuing education efforts also can provide regular "refreshers" on the respective roles of individual trustees and the board. For example, controversial matters or items of particular strategic importance offer built-in opportunities to rearticulate specific responsibilities for trustees and the value they are expected to add.

Ironically, veteran trustees with comprehensive knowledge and sophisticated understanding of the institution and its context may face an interesting challenge. Their confidence and expertise may lead them to stray from governance into management. This underscores the need to provide consistent clarity with respect to stewardship obligations.

An intimate familiarity with the institution, coupled with clear illustrations of its plans and progress, can inspire trustees to fulfill their charge: to bring insight and foresight to decisions that will determine the institution's long-term success.

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