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entitled

Community College Trustee Orientation and Training Influence on Use of Best Practices

by

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Submitted to the Graduate Faculty as partial fulfillment of the
requirements for the Doctor of Philosophy Degree in Higher Education

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An Abstract of

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The orientation and training of public community college trustees is inconsistent. This empirical study investigated that training and its influence on board use of best practices. The study used adult learning theory and involvement theory. Astin’s input-environment-outcome model was used as a conceptual framework with a blocked form of stepwise regression. The criterion variable was board use of best practices, created from a scale score of board best practices. Trustees from 146 institutions in 16 states responded to the electronic survey (n=253). Six predictor variables were significant at the p<.05 level. Results provided a better understanding of board use of best practices, orientation and training, and suggested ways in which trustee orientation and training could be improved.
Acknowledgements

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<tr>
<td>AACC</td>
<td>American Association of Community Colleges</td>
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<tr>
<td>ACCT</td>
<td>Association of Community College Trustees</td>
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<tr>
<td>AGB</td>
<td>Association of Governing Boards of Universities and Colleges</td>
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<tr>
<td>I-E-O</td>
<td>Astin’s Input-Environment-Outcome model</td>
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<td>IPEDS</td>
<td>Integrated Postsecondary Education Data System</td>
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<td>NAICS</td>
<td>North American Industry Classification System</td>
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<td>NCSDCC</td>
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Chapter One
Introduction

The American Association of Community Colleges reported there are 1,132 community colleges in the United States (American Association of Community Colleges, 2012). These colleges are typically governed by a board of trustees, members of which can be appointed, elected, or selected using a combination of both. Throughout the country states have a wide array of regulations, policies, and practices that determine if or how community colleges shall provide orientation and training to their boards of trustee members. Some colleges have developed and implemented a structured orientation and training program, while other colleges simply ask their new trustees to meet informally to discuss pressing issues.

Total enrollment at community colleges has increased from 9.3 million students in 1996, to 13 million students in 2009. This includes students enrolled in both credit-bearing and non-credit programs. The current number comprises 44% of all undergraduate students in the United States (American Association of Community Colleges, 2012). From 2000 to 2006, the number of students enrolled in credit-bearing programs at community colleges increased 9% (Provasnik & Planty, 2008). As the number of community college students grows, the potential impact of well-trained boards of trustees expands.

The Association of Community College Trustees (ACCT) conducted a survey of its members, and identified five overarching trends impacting trustees and colleges. First, trustees reported feeling an increased responsibility to be more flexible in responding to the learning needs of their communities. Second, the report indicated an increased sensitivity to financial constraints, influenced by factors such as shifting enrollment
trends, uncertain or declining government financial support, and increased pressure to respond to market forces. Third, trustees felt pressure to increase efficiencies, decrease costs and respond to governmental requirements and mandates, most likely through “Business Process Redesign” or related organizational structural changes. Fourth, the ACCT survey found trustees were concerned about the projected need throughout the workforce for increased postsecondary education, and consumer demand for non-traditional delivery methods with quickened pace. Finally, the survey suggested that trustees desire to better understand and respond to these complex issues (Association of Community College Trustees, 2005). An optimal understanding of these factors is desirable in providing informed decision-making and in guiding community college leadership.

**Problem Statement**

The orientation and training process for new community college trustees across the United States is inconsistent. New trustees face a steep learning curve in becoming familiar with the issues facing them as higher education leaders. However, the information trustees receive and the manner in which they receive it may or may not result in increased knowledge or professional growth. Community college trustees face increasingly complex demands – higher education financial constraints, expanding community service expectations, diverse educational and workplace training roles, increased community college enrollment, and multi-layered legal constructs.

Orientation programs and new-member training for community college trustees have evolved into a disjointed collection of educational activities. Davis (1997) stated only 14% of community colleges require trustees to participate in an orientation program.
Seventy percent of community college boards offer voluntary training for their new members, and 16% of colleges provide their boards with no formal orientation program. Oftentimes, board members begin their duties with only partial understanding and working knowledge of community college operations and related issues (Myran, Baker, Simone, & Zeiss, 2003). It is possible that without sufficient orientation, trustees have failed to understand their own responsibilities in the governance of the college (Davis, 2005).

**Purpose of Study**

This research examined the practice of providing orientation and training to community college trustees. The goal was to help determine what aspects of trustee orientation and training influence board use of best practices. The criterion variable of this study was community college boards of trustees’ use of best practices. This research hoped to discover what influences, if any, do blocks of variables related to orientation and training have on board use of best practices. Examples of variables included aspects of orientation and training, community college trustees themselves, the content and delivery methods, the context of the situation, the time and types of involvement of the trustees, and adult learning strategies. This study attempted to provide empirical research that can be used to better understand this issue. That empirical knowledge can be used by professionals who decide what information is most important to share with trustees, and the manner and context in which it could be optimally shared. The research can also be used by trustees to better understand their own expectations and participation levels in various learning activities.
If trustees are able to effectively and systematically learn more about their organizations and the higher education landscape, they might be better able to use their talents and creativity to address community college successes and challenges. An improved understanding of trustee orientation and training has the potential to positively impact students at individual institutions, and to impact students throughout our nation’s patchwork of community colleges.

**Theoretical Frameworks**

Existing models of new trustee training share characteristics and opinions, although none appear to be based on a theoretical framework and empirical research. Organizations, including ACCT and the Association of Governing Boards, have developed lists of recommended trustee orientation and training suggestions. These groups have diligently surveyed trustees and collected best practices from colleges, at conferences, and via professional networks. However, the typical methods of new trustee training at many colleges still appear to take a cookie-cutter approach. What is lacking from the current material is a theoretical rationale for, and evidence supporting, a comprehensive understanding of what orientation and training aspects are the most important for board use of best practices. Unlike the bountiful research surrounding the development of college students, there appears to be a lack of theory-driven work relative to the development of board members.

This study used two theoretical frameworks: (a) adult learning theory and (b) Astin’s involvement theory. Adult learning theory is the broad and evolving study of how adults learn. It has been differentiated from how children and adolescents learn, and from research into learning in general (Merriam, 1991). Knowles formally suggested that
adults do not learn in the same manner as children (1970). He coined the phrase andragogy, which served as a springboard for the contemporary study of adult learning. Critics have suggested that Knowles’ early work did not take into account the context of one’s learning, and that his work emphasized the cognitive, individualized aspects of learning (Merriam, 1991). In the 1970s and 1980s, researchers broadened the study of adult learning to include components of transformational learning (Mezirow, 1991), informal and incidental learning (Marsick & Watkins, 2001), and context-based adult learning (Hansman, 2001). More recently, blended learning has contributed to adult learning theory. Blended learning suggests that adults learn in a self-directed manner, and that learning is comprised of both formal instructional opportunities and informal activities from one’s occupation, background, and personal interests (Baldwin-Evans, 2006).

Considering that board members are adults, and that these adults must learn new information to carry out their duties as trustees, and that the context of their community college leadership is likely different from the context of their professional endeavors, it follows that the umbrella of adult learning theory is appropriate to examine how these trustees acquire and make meaning of this new information within their new roles. My intent was to focus on the contextual aspects of community college boards of trustees, and the members’ learning activities within that board. This study used adult learning theory to guide questioning into factors related to the delivery methods of trustee orientation and training.

Astin’s involvement theory is used to address the development of individuals’ talents, such as knowledge and skills. Astin stated that involvement is a straightforward measure
of the amount of “physical and psychological energy” one devotes to his or her college experience (Astin, 1985, p. 134). Astin continued by explaining that, “the amount of student learning…is directly proportional to the quality and quantity of student involvement.” And he wrote, “the effectiveness of any educational policy or practice is directly related to the capacity of that policy or practice to increase student involvement (p. 136).” Existing studies have established a foundation from which involvement theory has been used to examine the involvement of persons other than college undergraduates. Kinkley (2003) used involvement theory as a framework to investigate community college trustees’ perceptions of the effectiveness of their college presidents. Krebs (2004) used involvement theory to research community college faculty members’ perceptions of the effectiveness of professional development programs tied to Tech Prep programs.

In this study, rather than examining the growth of college students, Astin’s involvement theory was used to examine the talent development of community college trustees. This research, in part, helped provide additional knowledge about the extent to which trustees are involved in the orientation and training process. Involvement theory helped guide questioning into factors such as the types of involvement and the amount of time trustees devote to orientation and training activities. It was anticipated that trustees with a high level of involvement in orientation and training programs were more likely to use best practices as a board.
**Conceptual Framework**

This study used Astin’s input-environment-outcome (I-E-O) model as a conceptual framework to examine trustee training, and as the lens through which data was analyzed (Astin, 1993a). Although more often used to examine student development issues, Astin’s model guided investigation into the individual, organizational, and contextual factors that influence trustees’ development. The model facilitated examination of trustees’ roles and expectations; knowledge, skills and abilities; and trustee training programs. Astin’s model calls for the examination of characteristics that might affect a particular outcome. In this study, the outcome was board use of best practices. Input characteristics included items such as the professional background and education of the trustees themselves. Environmental characteristics included the topics covered in training programs, the delivery methods used by colleges, the time and types of involvement of trustees throughout the orientation and training process, the duration and depth of the programs, adult learning strategies, and institutional characteristics of the community colleges (see Figure 1).
Figure 1. Data Analysis Framework using Astin’s I-E-O Model

**Research Questions**

This research asked six questions, including:

1) What descriptive statistics describe community college trustee orientation and training activities?

2) What influence, if any, do the personal demographic characteristics and backgrounds of trustees have on board use of best practices?
3) What influence, if any, do institutional characteristics have on board use of best practices?

4) What influence, if any, do the content and delivery methods of trustee training programs have on board use of best practices?

5) What influence, if any, does the amount of time and types of involvement spent participating in orientation and training programs have on board use of best practices?

6) What influence, if any, do adult learning strategies have on board use of best practices?

**Methodological Approach**

This project was quantitative research using a web-based survey. This approach provided a nationwide perspective on the orientation and training trustees receive. The project included sending an electronic, web-based survey to trustees who serve on boards of community colleges that are either members of regional associations, or that are members of the National Council of State Directors of Community Colleges. To help build meaningful survey questions, I used existing literature on effective orientation and training activities for organizational leaders. To better inform the development of a survey instrument, I solicited the advice of former and current community college trustees to help identify the key aspects of their orientation and training. The study used regression analysis to analyze the survey results. Astin’s I-E-O model served as a guide to block the variables in the statistical analysis, using a blocked form of stepwise regression.
Significance of the Study

By focusing on board use of best practices, the study contributed to an improved understanding of what works well in orientation and training. A better understanding of these practices might improve the orientation and training experiences of both trustees and the professionals delivering that information. The potential applications of an improved community college trustee orientation and training are widespread. First, by identifying the most salient aspects of orientation and training, colleges could expand upon the knowledge base most relevant to community college leaders nationwide. Second, an enhanced understanding of issues important to community college leaders helps provide a common frame of reference with which trustees could maximize their advocacy efforts. Third, by identifying common concerns and issues, community college trustees are better able to collaboratively address issues and challenges. Fourth, since student development occurs in a relatively similar fashion, irrespective of geographic location (Evans, Forney, & Guido-DiBrito, 1998), leveraging leadership opportunities through increased understanding of issues key to student performance can help advance student learning and success. Finally, delivering information to new trustees in a rubric based on research and evidence can better make use of trustees’ limited and valuable time.

Limitations of the Study

The results of and knowledge gained from this study are most useful to community college trustees. By the nature of their institutions, community college trustees likely perceive that certain orientation and training topics are more relevant to their roles than topics that might interest university or residential college trustees. This study was limited
by the types of individual community college trustees who took the time to complete the survey. Presumably, trustees who shared their time in this endeavor might have an increased interest in improving training and development of fellow trustees and of best practices than those who do not complete the survey. This study was limited by the candor of the trustees’ responses. This study was limited by the use of an adult learning theory perspective. If trustees do not view orientation and training as learning opportunities, but instead view them simply as information gathering, they might not be concerned about the use of best practices.

The largest limitation of this study was obtaining a sufficient sample size so that appropriate regression analysis could be applied. Trustee contact information is most often not publically available. Instead, communication to trustees is routed through a professional staff member or president of the college. This study needed to rely on the assistance of regional professional associations and college professional staff to gain permission to access trustees. A prominent national community college trustee association that ideally could have provided access to its members via one mechanism declined the researcher’s request to use its membership database. Understandably, trustee time and access must be guarded. Once the initial trustee access was achieved, the next limitation of the study was the time constraints faced by trustees and the likely potential they would be reluctant or unwilling to complete the survey questionnaire. Again, this study needed to rely on the good recommendations and endorsement of known regional groups or people.

**Delimitations of the Study**

This study was delimited in the following ways:
a) The research was limited to community college trustees, and findings are not applicable to trustees of other types of higher education institutions, such as universities, and baccalaureate or masters-degree granting colleges.

b) The research was limited by the perspectives of the trustees, their life and professional experiences.

c) The research was limited by the perceived value of training held by the trustees.

Assumptions of the Study

This study assumed that community college trustees who participated completed the survey instrument in a candid and honest manner that accurately reflects their beliefs. This study assumed that the community college trustees were interested in sharing their recollections of orientation and training so that the practice could be examined and improved in the future. This study further assumed that community college trustees, as stewards of the public trust, were concerned with the effectiveness of college operations and practices.

Definition of Terms

The terms used in this study were defined as:

*Adult Learning Theory*: Collection of research that describes how persons of the majority age and/or beyond older adolescence learn new materials and information.

*American Association of Community Colleges (AACC)*: National professional association of community colleges based in Washington, DC.
Association of Community College Trustees (ACCT): National professional membership organization comprised of individual community college trustee members based in Washington, DC.

Best Practices: Actions or processes that have been recognized by higher education researchers, experts, trade associations, or governing bodies as highly effective or exemplary.

Board or Board of Trustees: The totality or whole of the individual members elected or appointed, and with fiduciary and legal responsibility for the operation of the institution.

Community College: Organization of postsecondary education designed to offer learning and education activities leading to the associate degree, certificate of study, and industry certification. Certificate and degree programs typically lead to one of two pathways: arts and sciences transfer to a baccalaureate institution or an applied technical program designed to lead to employment.

Involvement Theory: Theory proposed by Alexander Astin that states that the more involved students are within their college environment, the more successful they will be.

Orientation: The collection of activities, readings, and tasks designed to help train a new trustee for the purpose of serving on the board of trustees.

New Trustee: For the purposes of this study, a trustee who had not yet completed two full years of service at the time of the survey research.

President: The chief executive officer of the institution, approved and appointed by the board of trustees to make operational decisions on behalf of the board of trustees.
Training: The collection of activities, readings, and tasks designed to help brief or update trustees, and to help them learn about the context, roles and expectations of the board.

Trustee: Person elected or appointed to the board of a community college and who has fiduciary and legal responsibility for the operation of the institution.

Two-year College: Used interchangeably with community college.

Summary of Chapter One

The current study researched community college board use of best practices. The study used a quantitative research approach to survey trustees to ask them about the boards’ behaviors and their training activities. The researcher sent a request to participate and a link to an electronic survey to trustees via e-mail. Data were analyzed using regression analysis techniques.

Improving understanding of the orientation and training practices of community college trustees has the potential to positively impact the ways in which community colleges launch their new leaders. This study contributed to that understanding and provided a framework for practical implementation. A better understanding of the orientation and training experience of community college trustees has the potential to improve the subsequent educational experiences of millions of students. It has the potential to improve the organizational effectiveness of community colleges nationally, and the potential to make the experience more pleasant and relevant for the trustees. An improved understanding of orientation and training may also contribute to a more complete picture of the common issues facing community college leaders. The resulting understanding and knowledge can be used by trustees and community colleges to refine
effective orientation and training practices. State groups, college districts, and organizations such as ACCT and state associations of college trustees, might be interested in the findings as a basis for enhanced understanding to improve their training initiatives. Finally, this study contributed to the literature surrounding the development of community college trustees by offering knowledge based upon research, rather than opinion and anecdote.

**Overview of Upcoming Chapters**

The next chapter reviews literature cogent to the topic of trustee training. Chapter Three describes the methodological approach used in the study. Chapter Four reports and summarizes the findings of the research. Chapter Five offers observations about the relevance of the findings to the research questions, and suggest future uses of the results.
Chapter Two

Literature Review

The purpose of this study was to examine the influence, if any, of blocks of variables related to the orientation and training of community college trustees on board use of best practices. There has been a lack of theory-based research into the topic of training and orientation, to which this study hoped to contribute. This chapter was written to review the background and context leading to the study.

The current study used Alexander Astin’s input-environment-outcome model as a conceptual framework. The Astin model allows researchers to focus on outcome measures related to the baseline status of a given situation and/or potential environmental influences. The outcome measure in this study was board use of best practices. Two theories were used in this investigation to form a framework linking it to research: Astin’s involvement theory and adult learning theory. Involvement theory was used to address the level of energy one invests in a particular issue, while adult learning theory was used to connect the learning component of trustee training.

Chapter two presented an overview of best practices of boards of trustees, and the value of trustee training. Frequent types of trustee training programs were covered next, to better set the stage of what is currently being done. The chapter reviewed the typical roles of trustees, and highlights similarities throughout the decades and more recent changes. Given that trustees typically are either elected or appointed by a political figure, the researcher included the role of politics next. It was important to cover politics for two reasons, as political processes influence both the actions of boards, and impact the topics and issues covered by boards.
Next, the author described the demographic profile of community college trustees so that the reader can better understand the participants of orientation and training, as well as the profile of these people responsible for carrying out the duties under the watchful eye of the political process. After reviewing roles, trustee skills and knowledge were discussed. General operations of boards were important to cover so that readers have a better understanding of how boards might work. Different types of community college trustee professional organizations were included after the roles of community college trustees.

To check the pulse of related industries, the researcher reviewed contemporary orientation and training issues within health care organization boards of trustees. Similarly to community colleges, health care organizations are concerned about and have taken action to better prepare their trustee leaders. To say this differently, community colleges are not alone in their attempts to help orient and train their trustees. This might open future windows to identify best practices that could transcend sectors.

Finally, the conceptual model of this study was presented. Involvement theory and adult learning theory were reviewed. A summary of the chapter was presented last.

**Best Practices in Board of Trustee Operations**

Associations and experts have recommended best practices to community college boards for the operation of their institutions. Common themes existed among the recommendations. Some of these included acting within the guidance of the institutions’ mission, tradition, and history; making decisions that reflect and reinforce institutional values; emphasizing trustee growth and development; setting goals and grooming board leadership; encouraging debate; respecting the governing process; and paying attention to
strategies with an eye on the future. Specific characteristics and behaviors differentiate strong and weak boards (Chait, Holland, & Taylor, 1993). ACCT surveyed trustees and presidents in the mid 1990s. The association suggested effective boards need to know the roles and goals of the board, plan for the long-term success of the colleges’ welfare, understand and oversee the colleges’ finances, regularly assess the board itself, and maintain connection with trustee associations and current community college topics. In the ACCT survey, trustees themselves reported that boards should continue their educational development, work to have effective communication, and work to achieve the goals or ends of the institution (Vaughan & Weisman, 1997b). Others suggested that effective boards shape the future of the college via powerful engagement, and make policy decisions (Myran, Baker, Simone, & Zeiss, 2003).

Value of Trustee Training

Given the multiple roles of community college boards, experts and associations have stated that trustees have a great need of knowledge and information. Orientation and training of board members is brief, but the need is great. The Association of Governing Boards surveyed their members and found 65% of colleges spend half a day or less to orient and introduce trustees to their new roles (Association of Governing Boards of Universities and Colleges, 2009b). AGB reported new trustee orientation sessions typically include information on “trustee responsibilities, college mission and history, strategic priorities and challenges, a review of budget and financial matters, and academic programs and quality” (2009, p. 2). The association had made similar statements in its 1980 report, in which it stated new trustees need a systematic and thorough orientation. A 2005 report from the Chronicle of Higher Education indicated 40% of college trustees
stated they were “slightly” or “not at all” prepared for their role as a trustee (Selingo, 2007, p. A11). Selingo further reported that among trustees who felt unprepared, only 56% reported an excellent relationship with the college president. Vaughan and Weisman reported that 93% of trustees stated they received most of their information from the college president or his staff (1997). Burns (1966) wrote, “unless board members are adequately oriented to the task, it is unlikely they will perform at maximum effectiveness” (p. 69).

Boggs and Smith reported that college presidents felt orientation of new board members was valuable. Numerous presidents stated they felt it was important for the president to participate in the orientation of new board members. One president in their survey stated it can take up to two years before a board member truly feels informed and comfortable in their new role (Boggs & Smith, 1997). Anne Neal, co-founder and president of the American Council of Trustees and Alumni, used the Vaughan and Weisman survey results to support her call for, “some dramatic changes in the way our universities are governed,” (Marklein, 2007). The Association of Governing Boards provided support for the increasing role and scope of trustee orientation. AGB surveyed board professional staff members, and nearly 62% of them indicated training on trustee orientation would assist them in their jobs of supporting the board (Schwartz, 2010).

Ongoing training and professional development of trustees is infrequent. The Association of Community College Trustees estimated only 20% to 25% of trustees participate in professional development activities provided by states or professional associations (Polonio, 2005). The low levels of ongoing trustee training could be problematic, as Knowles has stated that half the knowledge a person knows will be
good orientation or training program is important to prevent problems among and within
the board. Boggs and Smith (1997) discovered that some boards are proactive and
provide some type of abridged orientation to board candidates even before they are
seated. This has provided good results, in that candidates can make a more informed
decision about serving on the board. Asera has suggested that positive student learning
outcomes would happen if community college organizations valued and planned for
professional development as an integral part of everyone’s responsibilities (Asera, 2009).

Trustees across all types of colleges indicated three areas of importance: knowledge of
the higher education institution, knowledge of politics within the institution, and
knowledge of the uniqueness of higher education institutions as compared to other sectors
(Michael, Schwartz, & Cravcenco, 2000). From their participation in trustee training
programs, Anderson and LaVista, shaped their trustee training format to highlight
survival skills for trustees (1994). These skills were intended to help clarify the roles of
trustees, and included an overview of the context of the community college, resources,
and finance. Trustees themselves indicated a need for some type of orientation and
training; however, they disagreed on the types of activities that should be provided
(Frederick, 1973). Similarly, Dika and Janosik reported that while studies suggest there
is a need for trustee training and orientation, “formal programmes may be non-existent or
ineffective” (2003, p. 276).

Support for trustee orientation and continued training is strong. Davis highlighted the
importance of providing both a solid content that takes into account the attributes of the
trustees, as well as an effective delivery method that is respectful of their busy schedules.
He suggested an effective education program would contain elements to learn the culture of the board; the context of the college; would be driven by the board itself; assist new trustees with effective group processes; bolster analytical decision making; gain better insight into key college stakeholders; and focus on strategic thinking for the future (Davis, 1997). However, there is a gap in understanding actual practices in the selection and training of trustees (Dika & Janosik, 2003). Only 33% of states have an orientation and training program, and only Texas requires attendance at its program.

The Association of Community College Trustees and other organizations have established best practices in community college training. In their New Trustee Training Guide, ACCT recommended trustees be given an opportunity to learn about their roles and responsibilities; the college’s programs, history, and culture; external trends and issues; college planning processes and budgets; board meetings and board operations; good human relations skills; and key individuals upon whom they can rely (ACCT, 2009).

**Evolving Roles of Community College Trustees**

The roles of community college trustees have been described as changing. However, common issues and themes have existed for nearly 50 years. Looking back, some of the issues facing community college trustees in the 1960s and 1970s are similar to issues facing trustees today.

In 1962 the Carnegie Foundation for the Advancement of Teaching summarized the responsibilities of college and university boards of trustees. These responsibilities included serving the public interest to the extent to which it can be served by their particular institution; maintaining a broad vision for the institution, as opposed to
focusing narrowly on the goals of one department or unit; representing the college or university to the world; providing a bridge between the institution and the community; protecting the institution from improper pressures or attacks; and the most important task was selecting a president (Carnegie Foundation for the Advancement of Teaching, 1962, pp. 8-10). Once a president was selected, the Carnegie Foundation stated it was important to establish the working relationship with the president. The Carnegie Foundation trustees further recommended that college boards focus on broader policy issues, while presidents focus on operations. The Carnegie trustees recommended the additional tasks of overseeing the physical, fiscal, and budgetary workings of the institution. The Carnegie Foundation stated a more challenging role of trustees was to work with faculty members to remain “well grounded” in the curriculum so that the board can “act wisely on major questions affecting the college” (Carnegie Foundation for the Advancement of Teaching, 1962, p. 11). In similar 1960’s fashion, Burns wrote the major functions of boards “cover a wide range of activities,” and “the role played by the trustee exerts a profound influence on the institution” (1966, p. 39).

A decade after the Carnegie Foundation report on trustees, Clark Kerr created a list of tasks critical to college trustees (Zwingle, 1975). His list included eight items with themes of creating an independent board, protecting the independence of their institution, reviewing the purpose of the institution, assuring the forward motion of the institution, managing resources, anticipating enrollments and making appropriate adjustments in advance, being in touch with stakeholders, and maintaining a voice at state and federal levels (Zwingle, 1975, p. 7). Although Kerr’s recommendations for boards did involve managing resources and providing for top-level leadership, his remarks also included
elements of maintaining autonomy and of advocacy. A 1973 Carnegie Commission report stated, “it is more important for the board to provide for effective governance than, as is once did, for it to govern” (Carnegie Commission on Higher Education, 1973, p. 36).

During the same era in the 1970s, researchers identified other roles and concerns of trustees. Doser (1976) emphasized the important role of political advocacy. The importance, in part, was due to decreased state funding allocations to community colleges, and to increased trends of state and national regulations, policies, and curriculum influence. These trends are remarkably similar to themes in the 2010s. Dziuba and Meardy (1975) prefaced a compilation of journal articles by listing challenges, including financial constraints, legal questions, energy usage, teacher “militancy”, collective bargaining, affirmative action, and political advocacy in Washington, DC (p. vii). The ACCT issued a survey to both community college presidents and trustees in 1975, and identified these top concerns among trustee respondents: president/board role; community college philosophy, role and mission; policy development and long-range planning; finance, funding and budget; and collective bargaining (Gilbert, 1976).

In 1981, Collie Coleman studied trustees and presidents at 24 comprehensive community colleges in Florida, Kentucky, North Carolina, and Tennessee to determine the factors each felt were important in governance. He asked trustees and presidents to rank the perceived importance on 13 issues. His research found trustees perceived their most important duty as determining if the college is meeting the needs of students. The second factor was establishing institutional policies. Meeting needs of community
groups was third most important to trustees, while the fourth factor was reviewing budget proposals. Trustees ranked communicating the colleges’ needs to state officials as fifth. Surprisingly, trustees ranked the selection and evaluation of college presidents as the ninth most important function (Coleman, 1981).

Coleman (1981) asked trustees and presidents to rate their perceived effectiveness in performing their duties. Trustees ranked themselves most effective in reviewing budget proposals, establishing institutional policies, insuring compliance with state and federal laws, and evaluating the performance of the president. Community college trustees ranked themselves least effective at preparing for collective bargaining, taking personnel actions, deciding on curriculum changes, and determining if the colleges were meeting the needs of community groups. In his discussion, the author pointed out that trustees perceived themselves to be slightly more effective than indicated by their college presidents.

Boards and presidents have separate roles in successful community college leadership. Gaining knowledge is important for both groups. Vaughn Sherman, former president of ACCT, challenged its membership in a 1993 speech in two ways. First, Sherman called for college presidents to provide for thorough learning opportunities for trustees. Second, he called on trustees to fully understand and embrace their role in governance so that they can provide a true job description to presidents, with which trustees can use to guide them in their responsibilities (Sherman, 1993). Derek Bok, former president of Harvard University, has written that trustees should require college presidents to apprise them of current methods used to assess the effectiveness of teaching, and to take up better ways to
educate students (Bok, 2005). He argued this type of interaction would elevate the
collection about the quality of learning.

Professional associations have helped define the role of college trustees. Recently, the
ACCT has suggested that two important roles of trustees include maintaining a
financially viable institution given budget cuts, and working with local businesses and
industry to provide relevant job-related education and training (Basham, 2008; Mangan,
2010). Board members were further accountable to make sure their colleges serve the
needs of their communities, and for “adopting, following, and enforcing standards of
conduct that respect the public trust” (Shultz, 2001, p. 8). Two other consistent beliefs
were that boards of trustees are responsible for nurturing and selecting leaders for their
institutions, and boards bear the responsibility of strategic planning and setting the
direction of colleges (Lovett, 2010; Boggs, 2011). To complement the importance of the
board-CEO relationship, Boggs (2011) stated community college CEOs regularly report
that maintaining a positive relationship is one of the most important aspects of the job.
Effective relationships have been further described to include a clear understanding of
roles, responsibilities, and practices; as well as having a positive functional and personal
relationship between the CEO and trustees (Perkins, 2012; White, 2011).

Holland, Chait, and Taylor (1989) listed six board competencies from their qualitative
study in which they interviewed trustees. They suggested that an effective board:
“understands institutional context, builds capacity for learning, nurtures the development
of the board as a group, recognizes complexities and nuances, respects and guards the
integrity of the governance process, and envisions and shapes institutional direction” (pp.
440-441). The authors described each of these characteristics relative to cognitive,
affective, contextual, political, and inter-personal dimensions. The AACC developed a list of six competencies for community college leaders. The association sought input from 125 members and advisory panel members. The list of competencies included: organizational strategy, resource management, communication, collaboration, community college advocacy, and professionalism (American Association of Community Colleges, 2005). Hassan, Dellow, and Jackson (2010) independently confirmed the six competencies and the importance of furthering them. The authors surveyed 58 community college trustees and 58 community college board chairpersons. Their results confirmed the work of AACC, and expanded it by suggesting the constructs were important for both presidents and board members. The authors suggested boards of trustees should use the six AACC competencies when hiring presidents, and when identifying candidates for leadership or in “grow your own leadership development programs” (Hassan, Dellow & Jackson, 2010, pp. 189-190).

Trustees themselves have provided feedback to help determine what they feel to be important, and to help determine how effective they are in addressing those issues. Michael and Schwartz (1999) surveyed university and college trustees, including community college trustees. Community college trustees ranked highest these roles: concern for long-range planning, making institutional policy, attention to budget, and support for the president. Community college trustees ranked lowest the role of providing direct institutional management. The researchers found more similarities in responses among the institutional types than statistically significant differences. As a practical matter, the authors suggested each higher education institution type should plan trustee orientation and training programs to best address the perceived roles of their
group (Michael & Schwartz, 1999). Shields stated board development is important in strengthening governance (2007). Community college trustees in Ohio indicated they would like additional training in the viability and strategic management of two-year colleges, state funding, and planning and goal setting (Bontrager, 2008).

Researchers and associations have recognized contemporary considerations and challenges to the roles of trustees. Broad (2011) wrote that both increased business and industry competition, and increased knowledge and learning competition from China and India have placed additional pressure on our colleges and universities. She suggested colleges and universities must work together and with partners to increase high school graduation and college preparedness; to help more people, especially underrepresented populations, attend college; and to create new pathways for learning. Community college boards have had to navigate more conflict, compete for fewer resources, and make more difficult decisions (Boggs & Smith, 1997).

Researchers have stated a prime role of boards of trustees is to provide for governance. Community college boards typically operated using one of two styles. The most common was the traditional style of governance common throughout organizations. The other style of governance was Policy Governance® or the Carver Model, which is the philosophy advanced by John Carver (Carver & Carver, 1997). The Carver model separates boards’ policy guidance functions from the administrative functions of presidents. This model clearly stated that the CEO works only for the board as a whole, and not for any individual trustee or factions. Approximately 15% of community and technical colleges use this style (Potter & Phelan, 2008). Regardless of the style,
effective boards must work together toward a common goal to move the institution forward (Doyle, 2009).

Three themes have emerged in the literature regarding the roles of community college trustees. First, trustees are accountable for the strategic direction and governance of the institution. Second, trustees carry the fiduciary responsibility of the institution. And third, trustees must maintain a working relationship with the CEO that when effective, fosters mutual success.

**Role and Influence of Politics**

State funding for community colleges has been cited by college trustees as a paramount concern. Community colleges have strong competition for state tax dollars, the largest being from K-12 education and Medicaid (Katsinas, Tollefson, & Reamey, 2008). Additional competing services included penal system corrections, public university higher education, transportation, and tax cuts. States’ revenue shortfalls have impacted community colleges, adding pressure and challenges to two-year college boards of trustees. J. Noah Brown, president and chief executive officer of the Association of Community College Trustees stated, “these college boards are under a lot of stress. We have more and more students, and more and more demands, and less and less money to get the job done,” (Mangan, 2010, p. B12).

States, including Iowa and South Carolina, have decreased their levels of funding to community colleges to the extent that tuition now accounts for a larger percentage of revenue than public funding (Kelderman, 2011). Tuition charges in Michigan and Colorado surpassed state funding in the early 1990s (Kelderman, 2011). California has decreased its funding to community colleges too. Across the country, community college
leaders predict tuition will increase and will account for a larger portion of the costs of educating students (Katsinas, Tollefson, & Reamey, 2008).

Pennsylvania’s community colleges have experienced unpredictable funding allocations, and have experienced a trend of relative funding declines (Evelyn, 2005). This has led to some colleges being unable to fund expensive programs, albeit programs in demand by business and industry. Evelyn (2005) reported community colleges in California, Oregon, and Illinois have attempted to equalize funding received from property taxes. Currently, college districts receive different amounts based on property values and location.

State directors of community college groups identified hot topics for their sector. The top five concerns included a shortage of nursing and allied health faculty; increases in online programs; public university caps pushing students to community colleges; shortages of science, technology, engineering, mathematics and medicine (STEMM) faculty; and budget pressures that will adversely affect community college students (Katsinas, Tollefson, & Reamey, 2008). At the same time state funding has declined, enrollment at community colleges has increased. One trustee stated this will put pressure on colleges to both raise tuition, and to request that faculty increase their workload (Kelderman, 2011).

In some states, the government has been active and direct in the ways it guides community colleges. The Association of Community College Trustees estimated that roughly 60% of trustees are appointed and 40% are elected (Association of Governing Boards of Universities and Colleges, 1980; Mangan, 2010). Although close, these numbers do not perfectly match a different account that suggested roughly 53% are
appointed and nearly 50% are elected (Moltz, 2009). A variety of entities appoint trustees, including governors, local elected officials, and university system officials (Davis, 1997). Some community colleges have both appointed and elected members. Two questions that might result from this mixed selection method are what, if any, expectations do governors or local elected officials have of their appointees; and how might any expectation influence trustee behavior? For public higher education institutions in general, the governor appoints all or some of the public college and university trustees in 47 states. In three states public college and university trustees are elected by the general assembly (Educational Policy Institute of Virginia Tech, 2000). Although more trustees identified themselves as Democratic at 47%, compared to Republican at 26%, 67% of trustees stated they were moderate (Vaughan & Weisman, 1997a). State governments have impacted the authority and roles of boards. California has limited the power of its college boards to determine some policies and large issues, which has resulted in boards focusing more on college operations (Boggs & Smith, 1997).

**Profile of Community College Trustees**

Vaughan and Weisman (1997b) surveyed 618 community college trustees and 680 presidents to create a profile of trustees and presidents. They found over 86% of trustees classified themselves as Caucasian, and nearly 67% were male. The number of females had increased from approximately 29% in a 1987 survey. Trustees had an average age of 57.6, but the majority was between the ages of 50 and 69. Eighty-five percent of trustees held at least a bachelor’s degree. Fifty-one percent of trustees had attended a community college. Community college trustees typically live in the communities served by their
college, and the AACC reported they are oftentimes leaders in those communities (Shults, 2001).

The Association of Community College Trustees surveyed roughly 750 two-year college boards from 39 states in 2009, and released the profile of trustees. They reported 66% are male, and 82% of board members are white. More than half of community college trustees earned over $100,000 per year, with 18% earning more than $200,000 per year. Thirty-two percent were from the business sector and 29% were from the education sector. More than half of the trustees were between the ages of 60 and 80, but only 30% of trustees were retired (Moltz, 2009). Bontrager found similar results in her research, although slightly fewer minorities and women were reported (2008). She found nearly 87% of trustees held a bachelor’s degree or higher, and nearly 38% had attended a community college.

**Overview of Trustee Associations**

National and state organizations have served community college trustees for decades. The interests of community college trustees are served primarily by two organizations at the national level, The Association of Community College Trustees and the Association of Governing Boards of Universities and Colleges. Numerous state-level organizations exist to address local or regional community college issues. Some support and information has been provided by the U.S. Department of Education Office of Adult and Vocational Education, which is targeted specifically to community colleges.

The Association of Community College Trustees (ACCT), the largest in terms of community college participation, is an affiliate of the American Association of Community Colleges (AACC). It was founded in 1972 as a nonprofit organization.
ACCT reported it has more than 6,500 member trustees at over 1,200 two-year colleges (Association of Community College Trustees, 2011). ACCT reported its core mission activities included providing national advocacy and representation to “support community colleges and their students,” improving a system of accountability, emphasizing student success and access, strengthening leadership and governance at community colleges, providing assistance with executive search functions, and creating and disseminating publications and information relevant to community colleges (Association of Community College Trustees, 2010b). The association reported $5,841,468 in total assets in its fiscal year 2010 annual report. It reported four sources of revenue: membership dues, 40%; education services, 32%; board services, 19%; and sponsorships/interest/other, 9% (Association of Community College Trustees, 2010a). The association is governed by a board of directors who are members.

The Association of Governing Boards of Universities and Colleges (AGB) was established in 1921 and provides support and services to college and university trustees. It is a nonprofit organization. Although it has a membership of more than 34,000 persons at more than 1,200 organizations, it served approximately 30 community college boards directly (Association of Governing Boards of Universities and Colleges, 2009a, 2011a). Unlike the ACCT, the AGB serves a larger audience of higher education-related stakeholders, including trustees of private colleges, public colleges, foundations, state coordinating boards, and other private boards. Like the ACCT, the AGB is led by a board of member trustees. It includes a council of college presidents and a council of board chairpersons. The AGB employs a professional staff. In its 2009 annual report, the AGB reported its top areas of focus include improving functions and operations of
postsecondary institutions’ boards of trustees, addressing issues to improve institutions, and providing advocacy and awareness for related public policy (2009). In its 2010 annual report, AGB stated it is working on projects focused on quality, leadership, and strategic finance (2011). Similarly to the ACCT, the AGB provides consulting, research, publications, professional development, and benchmarking services. Its net assets for fiscal year 2010 were $6,882,575 (Association of Governing Boards of Universities and Colleges, 2011b).

Two smaller, specialized associations serve community colleges. The National Council of State Association Chief Executives (NCSACE) serves community colleges in 24 states. The council is made up of representatives from the member associations. Community colleges frequently pay a membership fee to belong to their statewide association. The associations sometime offer updates, training, and forums for community college trustees and senior leaders. These state associations serve as the basis for outreach in this study. In Ohio, the Ohio Association of Community Colleges (OACC) provides resources from a central office, but it has enhanced its educational offerings and communication by providing regional meetings for trustees. Participation in these regional meetings has been strong, and the format well received by its members (R. Abrams, personal communication, November 2011).

The National Council of State Directors of Community Colleges is an affiliate of the AACC, and serves administrators who oversee community colleges in the states. This might include a state chancellor of public higher education, a designee of the government or a designee of a higher education system. Its website stated the purpose of the council is to “provide a forum for the exchange of information about developments, trends, and
problems in state systems of community colleges” (National Council of State Directors of Community Colleges, 2011, para.).

**Parallel Concerns for Trustee Education in Health Care**

Trustees at non-profit hospitals have performed similar duties to those at community colleges, lending ideas and foundations for trustee orientation and training. As identified in the higher education literature, health care trustees select and evaluate the CEO, review and adopt long-term strategic plans, provide for resources to accomplish the organization’s goals, and ensure that the organization operates responsibly and effectively (Holland, Ritvo, & Kovner, 1998). Although the direct stakeholders are different – community colleges help students, while non-profit hospitals assist patients – the two types of organizations share similar characteristics. Both are governed by a board of trustees, have professional administrators, are exposed to a broad range of regulations and law, oversee an organization with a wide array of personnel, ranging from entry-level positions to highly educated professionals (faculty or physicians) who share in the organization’s governance, are influenced by cutting-edge technology, play prominent roles in their communities, and are impacted by changes in the financial funding provided by third parties and the government.

Hospital trustee orientation has received much attention, with an emphasis on increasing the effectiveness of governance. Some themes within hospital trustee training have been similar to those in higher education. These hospital trustee training topics and concerns included building an understanding of what the hospital does and how it does it, understanding the organization’s economic model, and knowing how the organization fulfills its mission (Larson, 2009). Others topics included understanding the structure and
culture, and being knowledgeable about the organization’s market share and competitors. Friede argued that thorough orientation and training helps hospital board members be more productive and allows for more participation (Friede, 2007). Larson wrote that trustee mentoring programs has been helpful in ongoing education efforts (2009). Others have warned that there is no quick fix for trustee education, and that “significant, long-term” training programs are necessary to improve the knowledge of trustees (Kiely, 2007, p. 24). Some have argued that both initial board member orientation and continuing education are necessary to truly understand healthcare. This perspective of trustee education goes beyond intermittent sessions, and has been considered “board knowledge and intelligence building” (Mycek, 2006).

Hospital associations in three states, Georgia, Minnesota, and Tennessee, have increased awareness of trustee training by adopting voluntary certification for hospital trustees. This voluntary action followed the State of New Jersey, which in 2007 mandated that newly appointed hospital trustees undergo education (Evans, 2009). In Massachusetts, Blue Cross and Blue Shield began encouraging education for hospital boards to boost performance, and provided financial incentives for participation. The Center for Healthcare Governance issued a report that highlighted the importance of providing for trustee education, and recommended putting into place an “ongoing board education and development program that offers all board members…opportunities…for getting the information they need to govern effectively” (Center for Healthcare Governance, 2007, p. 16). Best practices within hospital board training efforts may be useful for community colleges.
Conceptual Model

The conceptual model guiding the current study was Alexander Astin’s input-environment outcome (I-E-O) model. He proposed the model as a way to conduct assessment activities in higher education. The model links input variables, environmental variables, and outcomes (see Figure 1) (Astin, 1993a). Astin asked three questions about educational research. Each question is tied into one component of the I-E-O model: 1) “Is it reasonable to suppose that an institution should want to know something about its new students?” 2) “Is it reasonable to expect that we should know what educational experiences our students are having in college?” and 3) “Is it reasonable to expect that we should know something about the educational progress of each student?” (Astin, 1993a, pp. 153-154). Throughout his research, Astin uses the I-E-O model as the conceptual foundation for his statistical analysis, by grouping numerous variables in blocks according to the I-E-O categories and then by employing regression analysis (Astin, 1993b).

Involvement Theory

Alexander Astin conceived involvement theory as a way to describe and quantify the types of and the extent to which people invest of themselves in particular activities. It has themes of a holistic talent development ethos, in which it is desirable for people to improve their skills and abilities. Astin suggested one method to improve people’s abilities is investing more of themselves into an activity or into the endeavor at hand. He wrote involvement, “refers to the amount of physical and psychological energy that the student devotes to the academic experience” (Astin, 1985, p. 134). In his studies, Astin found that the most important influence on students is their peers (Astin, 1996).
Although other services and interactions, such as student affairs programming or faculty interaction show positive results in student performance, the peer effect has the greatest influence.

Existing studies have established a foundation from which involvement theory is expanded to examine the involvement of persons other than students. Kinkley (2003) used involvement theory as a framework to investigate community college trustees’ perceptions of the effectiveness of their college presidents. Krebs (2004) used involvement theory to research community college faculty members’ perceptions of the effectiveness of professional development programs tied to Tech Prep programs. Barger (2010) used involvement theory and the I-E-O model to investigate faculty satisfaction with academic freedom. The current study extended the use of involvement theory to community college trustees. It was anticipated that as in other studies using the I-E-O model for adult populations, the current study would find significant predictors of the dependent variable using this model with community college trustees. The peer effect, found by Astin among students, could potentially be important in the types of orientation and training activities trustees perceive to be most effective. If so, future research could explore how learning activities could be structured in ways to maximize that peer benefit.

**Adult Learning Theory**

Adult learning theory has been traced to roots in the 18th century and is a construct that continues to evolve. Thompson (2009) described early research efforts on adult learning as primarily focused on memory and aging. The modern expansion of research on adult learning occurred in the early 1900s. Thompson wrote that this was due in part to the blossoming work in developmental psychology, and to the changing cultural norms
associated with adult vocational education following World War I. Other factors included the growing number of university extension programs, and educational programs offered by the YMCA. Politically, the U.S. government placed an emphasis on adult training and education during this time. Congress passed the Smith-Hughes Act in 1917 that established funding for vocational education (Brubacher & Rudy, 2006). Not only did this law endorse adult learning, but it contributed to the foundation for the eventual evolution of two-year colleges.

Malcolm Knowles has been widely recognized as a pivotal figure in the study of adult learning and adult learning theory. He continued the research of others, and emphasized the idea of andragogy. He defined andragogy as the ways in which adults learn, as compared to the ways in which children learn, referred to as pedagogy. Knowles suggested that adults are self-directed and take on learning challenges with purpose and ownership (Smith & DeFrates-Densch, 2009). Knowles identified five assumptions of adult learners:

- self-concept: Adults move from a dependent personality to an increasingly self-directed human being;
- experience: Adults have a larger volume of knowledge and different quality than youth;
- readiness to learn: As adults age, motivation for learning is increasingly focused on life tasks, issues, and challenges. They are ready to learn as situations requiring more knowledge appear;
orientation to learn: As a person ages, his or her focus changes from postponed application of knowledge to current application. Adult learning is life-centered, task-centered, or problem-centered, rather than content-centered; and

motivation to learn: Internal motivation to learn grows as people age, such as learning for self-esteem, recognition, or better quality of life, or greater self-confidence (Knowles, 1984).

Adult learning theory is a larger umbrella under which smaller, specific paradigms or interpretations have nestled. Recent studies of adult learning theory accounted for the context of the learner during meaning making. Adult learning theory has been categorized into different types of learning, including instrumental learning, self-directed learning, experiential learning, perspective transformation, and situated cognition (Amstutz, 1999). Other researchers have emphasized a multidimensional approach to learning, in which both the context of the learning and the manner in which instruction occurs are important (Merriam, 2008).

Researchers described the core of self-directed learning as persons’ abilities to identify that which they do not know, and to then learn that information (Brookfield, 1986; Knowles, 1983; Thompson, 2009). Mezirow (1991) suggested that a goal of adult learning should be to help learners to be self-guided and self-reflected. One adult learning paradigm, self-directed learning, attributes a great deal of autonomy to the adult learner. It has both cognitive and motivational components, which introduces aspects beyond the earliest adult learning research notions of memory and aging. Self-directed learning researchers imply that “adults can plan, conduct, and evaluate their own learning” (Amstutz, 1999, p. 23). Roulston suggested that adult learners have the “means
and ability to shop around for educational opportunities” (2010, p. 345). Hays (2009) wrote that self-directed learning is the best way to develop both breadth and depth of knowledge. Others wrote that educators must help adults become better self-directed learners as to build their capacity to learn, and to avoid an increased dependence on an instructor (Mezirow, 1981). Overall, Thompson (2009) stated self-directed learning is a contemporary and important area of research. Community college trustees need both breadth and depth of knowledge, and the ability to learn on their own as they tackle numerous issues affecting their institutions.

Kolb introduced the concept of experiential learning in 1984 and applied it to adult education. He presented an axis that described how people take in experiences and how they act on that information. The combination of taking in information and the way in which people acted upon it resulted in four learning styles: concrete experience, reflective observation, abstract conceptualization, and active experimentation (Kolb, 1984). He proposed these styles are cyclical, but people typically employ only one of the four phases. Researchers have used Kolb’s theory and subsequent learning style inventory in efforts to improve teamwork, leadership, and problem solving (Kamis & Kahn, 2009; Kayes & Kolb, 2005; Turesky & Gallagher, 2011).

Blended learning, an offshoot of adult learning theory, has provided a tool to help professionals learn more effectively. In 2005 Baldwin-Evans conducted a survey of 3,000 random employees within a large, global company to ask how they preferred to learn. The company had embarked on a blended learning model to improve employee knowledge. She found 67% preferred a mixture of both informal learning and more structured instructor-led activities (Baldwin-Evans, 2006). Informal learning includes
activities such as learning from peers, reading by oneself, and using online resources. The blended learning approach was praised by employees and was recognized by the company as positively impacting the knowledge and culture of the organization (Voci & Young, 2001). The method allowed participants to benefit from both the organized discussion and group dynamics of traditional classroom activities, and from the flexibility of self-paced learning online and independent efforts. As part of a blended learning model, Hwang, Hsu, Tretiakov, Chou, & Lee (2009) found that people’s internal communication and meaning making were more important than either formal communication or casual communication with others. They called this process intra-communication, and defined it as written representations to externalize one’s knowledge. This intra-communication relates to the broader concept of self-directed learning in that it empowers learners to make meaning and determine what they do and do not know. This ability to make meaning and determine what is known has been facilitated by adults’ broad life experiences as compared to the same ability in children and younger learners (Roulston, 2010).

Increased understanding of how people learn in the workplace has helped organizations offer better learning opportunities. This has included knowing how people solve problems, and knowing how specific groups learn (Fenwick, 2008). Fenwick defined workplace learning as, “relations and dynamics among individual actors and collectives” (2008, p. 19). Gentner, Loewenstein, and Thompson demonstrated analogical encoding, a concept describing the way in which people compare two distinct scenarios, to be an effective way for adults to quickly learn new information (2003). Not only was the learning faster, but participants using an analogical encoding approach were
able to understand and retain more key elements of the new material than people simply learning new material absent a comparison.

Researchers have studied how workplace learning can be linked to concepts of adult learning theory. Grenier (2009) researched how museums develop and train better docents. Her participants were primarily professional, middle-age, middle-class females who were active in their communities. These characteristics are similar to many community college trustees. She found that although formal learning activities were valuable, three types of learning were even more important: learning from others, self-directed learning, and learning by doing (Grenier, 2009). Similarly, aligning workplace training with the assumptions and strategies of adult learning theory increased its effectiveness (English, 1999; Westover, 2009; Woodward, 2007). Linking learning directly to trustees, the Community College League of California reported that trustees, like all adults, learn best when “they have control over the experience, learning is problem centered, when there is immediate application of knowledge, and with opportunities for interaction and discussion” (Smith, 1999).

Adults’ informal learning has been identified as useful for and desirable to organizations. Mündel and Schugurensky (2008) found that by participating in community organizations and becoming more engaged in civic activities, volunteers learned information instrumental to performing duties of the organization. Further, volunteers enhanced their learning about working together within the organizations, and learned through individual and group reflection. Although none of these activities occurred in a formal classroom setting, the learning and skills were found to help the organizations. Research has suggested that non-profit organization volunteers are likely
to volunteer at multiple organizations (Weerts & Ronca, 2008). If community college trustees are involved in serving other organizations, then they might also learn at that other organization. The additional service might contribute to their roles as a trustee, and vice versa. In other words, trustees may learn skills at one organization that could be applied at another.

Some skepticism exists regarding adult learning theory and its application in the workplace. One critique of the andragogy concept has been that it is not directly measurable in the way a scientific theory is (Taylor & Kroth, 2009). In one organizational setting, Daloisio and Firestone (1983) found two concerns. First, participants in a management-training program were more accustomed to having an extrinsic source of motivation. Second, the motivation participants did have decreased over time. During the management-training program routine work tasks took precedence over the training activities, which resulted in lower levels of commitment to the program. These findings might be a result of the particular training program components or its implementation. Critiques of adult learning theory have contributed to continued attention to and research on adults’ learning and adult learning theory.

**Summary of Chapter Two**

This chapter reviewed community college trustees, how boards of trustees are structured, and the issues important to them. Training and best practices were summarized. Trustee associations and individual trustee characteristics and roles were reviewed, and the political climate of board operations was discussed. A comparison was drawn between community college and health care systems so that related issues could be identified and common boards of trustees’ practices and development could be explored.
Chapter Two reviewed learning theory and Astin’s involvement theory to establish a platform from which the current research could investigate community college trustee orientation and training. Adult learning theory followed, including descriptions of how adult learning might be different from the learning of children.

**Overview of Upcoming Chapters**

Chapter Three describes the methodological approach used in the study. Chapter Four reports and summarizes the findings of the research. Chapter Five offers observations about the relevance of the findings to the research questions, and suggests future uses of the results.
Chapter Three

Methodology

Introduction

This chapter reviewed the methods to be used in this study of community college trustees’ orientation and training and the influence on board use of best practices. The theoretical framework included Astin’s involvement theory and adult learning theory. The data analysis framework for the research was Astin’s input-environment-outcome (I-E-O) model. The population was community college trustees in the United States. Data was collected using a web-based survey that was e-mailed to a sample of boards of trustees. Data was analyzed using a blocked form of stepwise regression. Study assumptions, limitations, and summary were included.

Restatement of the Problem

The orientation and training process for new community college trustees across the United States is inconsistent. New trustees must learn about and become familiar with numerous issues facing them as higher education leaders. However, the information trustees receive and the manner in which they receive it may or may not result in increased knowledge or professional growth. Researchers and education professionals have described the categories and informational content that new trustees should learn. However, data are lacking that describes the best methods for trustees to actually learn that information, and on whether what trustees learn influences board use of best practices.
Restatement of the Purpose and Research Questions

This research examined the practice of providing training to community college trustees. The goal was to help identify what aspects of trustee orientation and training, if any, influence board use of best practices. The criterion or dependent variable of this study was community college board use of best practices. The reason for selecting boards’ best practices was because the actions of boards are measured, recorded, and required to be implemented as a whole rather than as individuals. Existing research on best practices addresses the results of actions of the entire body. This research hoped to discover what influences, if any, the frequency and type of training provided to board members has on board use of best practices.

The study sought to answer six research questions regarding community college trustees:

1) What descriptive statistics describe community college trustee orientation and training activities?
2) What influence, if any, do the personal demographic characteristics and backgrounds of trustees have on board use of best practices?
3) What influence, if any, do institutional characteristics have on board use of best practices?
4) What influence, if any, do the content and delivery methods of trustee training programs have on board use of best practices?
5) What influence, if any, does the amount of time and types of involvement spent participating in orientation and training programs have on board use of best practices?
6) What influence, if any, do adult learning strategies have on board use of best practices?

**Research Design**

This study used cross-sectional survey research, and analyzed data using a blocked form of stepwise regression. It was the goal of this research to identify how, if at all, trustee orientation and training influence board use of best practices.

**Theoretical Framework**

This study used two theoretical frameworks: (a) adult learning theory, and (b) Astin’s involvement theory. Adult learning theory is the broad and evolving study of how adults learn. Knowles (1970) advanced the idea that adults learn differently from younger students and children. Adult learning theory researchers oftentimes suggest that adults are self-directed in their learning motivation and desires. Researchers have described the core of self-directed learning as persons’ abilities to identify that which they do not know, and to then learn that information (Brookfield, 1986; Knowles, 1983; Thompson, 2009). This contrasts to traditional learning at younger ages in which students are presented a prescribed set of knowledge, oftentimes in classroom settings. Recent studies of adult learning theory have expanded in scope to include the context of the learner during meaning making. Adult learning theory recognizes both formal and informal learning activities. Formal learning is more traditionally associated with classroom-style interactions among a facilitator and pupils, whereas informal learning includes activities such as learning from peers, reading by oneself, and independently using online resources. A blended approach to adult learning that includes both formal and informal activities has been praised as effective (Baldwin-Evans, 2006; Voci & Young, 2001).
Astin’s involvement theory describes and quantifies the types of and the extent to which people invest of themselves in particular activities. Involvement “refers to the amount of physical and psychological energy that the student devotes to the academic experience” (Astin, 1985, p. 134). He grouped behaviors into blocks related to one’s involvement with academics, faculty, student peers, work, and other activities. Astin found that involvement-related variables were associated with many desirable student outcomes, including greater levels of retention, increases in general knowledge, one’s ability to think critically, selecting certain career paths, analytical and problem solving skills, and overall satisfaction (Astin, 1993b). Astin’s involvement theory has been used to study college students, faculty, and college trustees (Astin, 1985, 1993b, 1996; Barger, 2010; Kinkley, 2003; Krebs, 2004).

Conceptual and Data Analysis Framework

This study used Astin’s input-environment-outcome (I-E-O) model as a conceptual framework to examine trustee training, and as the lens through which data was analyzed (Astin, 1993a). Astin’s model calls for the examination of characteristics that might affect a particular outcome. Astin wrote “inputs refer to the characteristics at the time of initial entry; environment refers to various programs, policies, and experiences; and outcomes refer to characteristics after exposure to the environment” (Astin, 1993b, p. 7). Astin further argued that this model is appropriate to measure change in individuals over time. In the current study, input characteristics included items such as the professional background and education of the trustees themselves. Environmental characteristics included the topics covered in orientation and training programs, the delivery methods used by colleges, the types of involvement of trustees throughout the orientation and
training process, the duration and depth of the programs, and institutional characteristics of the community colleges. The outcome measure in the current study was board use of best practices (see Figure 1).

**Population and Sample of Interest**

The survey population for this study was trustees at public community colleges. The American Association of Community Colleges reported that there are 1,132 community colleges in the United States (American Association of Community Colleges, 2012). This project used a sample of convenience – groups of trustees who would be more likely and willing to complete the survey (Creswell, 2005). The sample was community college trustees who serve at institutions that are members of state community college trustee associations within the National Council of State Directors of Community Colleges (NCSDCC). There are 24 state associations representing 576 community colleges that participate in NCSDCC (National Council of State Directors of Community Colleges, 2011) (See Appendix G).

Rather than contacting nearly 1,200 community colleges unannounced, this study sought the support and endorsement of community college associations through this national leadership group. This approach provided increased legitimacy, increased access to trustees, and ideally led to increased participation and response. It provided for more accurate identification of sitting trustees, as at any one time multiple trustee positions at a college might be vacant or awaiting appointment. Contacting trustees through an association rather than independently further allowed for an approach typical of preferred trustee communication protocols.
To avoid sending duplicate surveys to boards, and to identify the bona fide governance entity and unit ID, the researcher used a variety of sources to determine the primary campus or organizational unit. The researcher consulted with the directors of the state community college organizations. One source, the National Center for Educational Statistics IPEDS database, listed several community colleges as the central office or district office. Higher Education Publications, Inc. published a higher education directory that was useful in helping to identify the appropriate organizational structure. Another reference source, the American Association of Community Colleges, provided institutional membership information and contact information.

**Data Collection Procedures**

Data for this survey was collected from a web-based survey e-mailed to community college trustees (see Appendix A) in the winter of 2011-2012. Initial contact was made with the chief executives of state community college trustee associations to seek endorsement of the study and access to their member trustees. The researcher asked for a letter of support for the survey research, and asked the state associations to notify their membership of the project via e-mail. The state association chief executives emailed their trustees or presidents a brief request to participate that contained a URL link to the web-based survey. The researcher worked with one state association leader to gain entrée into the national group, and to seek counsel on the best methods to distribute the surveys.

The research instructions asked the trustees to complete the web-based survey (see Appendix B). The researcher decided to use a web-based survey to increase the number of trustees who would potentially complete the instrument. In reviewing the concept of this study with former community college trustees, the researcher was advised both to use
a paper survey and a web-based survey. Other community college leaders advised the researcher to avoid asking boards to complete the survey in a group setting, as the limited time of public board meetings is precious.

This survey research used a social exchange theory perspective to solicit responses. To increase the success of surveys using this perspective, researchers have been advised to consider three factors: maximizing perceived rewards, reducing perceived costs, and establishing trust so that respondents feel the rewards outweigh the costs (Dillman, Smyth, & Christian, 2009). To maximize rewards to potential respondents, this research briefly highlighted the benefits of increased understanding of trustee training and development as it relates to board use of best practices. A potential incentive could have been the potential for improved board operation, possible with expanded knowledge revealed by this study. To reduce perceived costs or risk of completing the survey, participants were assured confidentiality. Data were reported only in aggregate form. To establish trust and to provide an argument for participation, this research asked for the endorsement first from the Ohio Association of Community Colleges, and then other associations who are members of the National Council of Directors of Community Colleges.

The survey distribution protocol consisted of a modified four-step process (Dillman, Smyth, & Christian, 2009; Babbie, 1990), including:

1. First, a link to the electronic questionnaire package along with a message of endorsement from the state associations, detailed information, and instructions was emailed to trustees. This message was e-mailed from the state association chief executives who were willing to endorse the survey. The researcher was not in
possession of trustee email addresses or contact information, with the exception of
one state whose association guided the delivery method.

2. After a two-week waiting period, a second electronic questionnaire package similar to
the first was e-mailed to association directors with a reminder prompt to complete the
survey if not yet done.

3. If additional respondents were required after two electronic attempts and an
additional two-week waiting period, a final contact attempt was made via telephone.

4. At the conclusion of the study, an executive summary of results and thank you
message was shared with associations and their trustees.

The communication plan was a blended approach that included both e-mail and telephone
communication. The purpose of using a blended approach is to maximize the trustee
responses, minimize mailing costs, and leverage technology. Responses were tracked
daily, then weekly to monitor the progress. No incentives were offered for participation.

Survey Instrument

The researcher developed a web-based survey questionnaire entitled *Trustee Training
and Best Practices Survey* based on conversations with past trustees, college
administrators, and information gathered from the literature review (see Appendix A).
The survey was tested in two ways. First, the researcher asked colleagues familiar with
trustee training to review the draft instrument. The researcher asked them for input and
feedback on the clarity of the directions, the face validity of the questions, and if they
would add or remove any items. After their feedback was gathered and compiled, the
researcher adjusted the questionnaire. Then the researcher repeated the process with
former community college trustees. The same input was solicited. The researcher further
asked them to complete the survey and evaluate it on its pertinence, syntax and layout, and ease of use (Babbie, 1990). After former community college trustees provided feedback, the researcher made corrections to create the final survey instrument. With this input and changes, the instrument was distributed to the associations for the trustees.

The survey instrument was formatted in two ways. First, the survey was formatted for electronic distribution using the Vovici™ survey software application. Second, the survey was formatted for print to include attractive use of white space. Both formats used clear and concise directions, a logical flow of questions, mutually exclusive response categories, and no more questions than needed to answer the research questions (Dillman, Smyth, & Christian, 2009). The researcher solicited input and recommendations on the communication to trustees from current and former presidents. The objective was to craft an effective written request that trustees were more inclined to open and to act upon. This research attempted to maximize reliability by asking clear, unambiguous questions related to trusteeship to which trustees would be able to provide an answer. Instructions for the implementation of the survey instrument were provided and were written in a clear and concise manner (Creswell, 2005). The researcher sought permission and received approval from the university’s human subjects review board (IRB) prior to testing the survey and distributing it.

Questions on the survey instrument were grouped into five blocks of variables (see Figure 2; see Appendix D). The first block of questions on the survey instrument asked personal demographic and background questions of the trustees. It has been recommended that routine personal demographic questions be asked last in a written survey so that participants have the opportunity to read the survey, and to feel more
comfortable sharing personal information. It is more effective to ask meaningful, relevant questions from the beginning. Asking personal questions at the end helps avoid the feeling of simply completing another mundane questionnaire (Babbie, 1990). Although these questions were asked last, this block was entered first into the statistical analysis as the input block.

Determining personal demographic and background characteristics of trustees was important to better understand how these trustees might learn during orientation and training programs. Knowles (1984) suggested that adults have a wide variety of experiences and a broad variety of knowledge that impact the ways in which they learn. Understanding trustees’ experiences and backgrounds helped create a more accurate picture of these experiences and baseline levels of knowledge or experiences. Another reason to ask demographic questions was to compare the sample population with that of previous trustee research, and then to look for any differences in the groups. The American Association of Community Colleges surveyed trustees and found 66% of trustees are male, and 82% of board members are white. More than half of community college trustees earned over $100,000 per year, with 18% earning more than $200,000 per year. Thirty-two percent were from the business sector and 29% were from the education sector (Moltz, 2009). Bontrager found similar results in her research, although slightly fewer minorities and women were reported (2008). She found nearly 87% of trustees held a bachelor’s degree or higher, and nearly 38% had attended a community college. In the first block of questions of this study, participants were asked to indicate their occupation. This occupational information was grouped according to the North American Industry Classification System (NAICS) categories for the purposes of
descriptive statistics. The NAICS is an offshoot of the United States Census Bureau (U.S. Census Bureau, 2012).

Shults (2001) found the majority of trustees were between the ages of 50 and 69. Understanding the backgrounds of trustees was necessary to look for differences among various subgroups within the sample. For example, trustees who are in their 60s might learn differently than trustees in their 40s, or trustees who work in different sectors might have different approaches to learning.

The second block of variables was institutional characteristics. This information was entered into the statistical analysis in the environmental block. The survey instrument asked trustees only two questions, the name, and city and state of their institution. Then the researcher used that element to obtain institutional characteristics from the Integrated Postsecondary Education Data System (IPEDS) of the U.S. Department of Education Institute of Education Sciences. This comparative information was necessary to determine differences among use of best practices potentially due to student enrollment, type of institutional control, inclusion within a college or university system, funding, location, and the like. Further data was added from the Carnegie classification system, and appended to each institution by the IPEDS unit ID.

The third block asked questions related to the content and delivery methods of trustee orientation and training programs. This information was entered in the environment block. It was the goal of this group of variables to better understand what orientation and training topics were covered, and to better know how these activities were presented. Literature from professional associations describing what community college trustees should know, and literature describing adult learning theory drove the questions for this
Davis (1997) wrote that it is important to deliver trustee orientation and training in ways that best mesh with trustees’ busy personal and professional schedules. Associations such as AACC, ACCT, and AGB have described content areas in which trustees should be knowledgeable. Baldwin-Evans (2006) found that two-thirds of adults preferred a blended learning method of both formal and informal learning activities. Using that information, it was useful to determine what delivery methods are used in orientation and training programs, as it relates to use of best practices. Research has suggested that learning from others, self-directed learning, and learning by doing are three effective methods of gaining and retaining new knowledge (Grenier, 2009). By asking questions about the content areas and delivery methods of orientation and training programs, this research better understood what materials are presented to trustees and how those materials are introduced.

The fourth block of questions on the survey instrument asked about the amount of time and types of involvement of trustees in orientation and training activities. This information was entered in the environment block. Astin’s involvement theory served as the foundation for questions in this block of variables. Astin created involvement theory to describe and quantify the types of and the extent to which people invest of themselves in particular activities. He wrote involvement “refers to the amount of physical and psychological energy that the student devotes to the academic experience” (Astin, 1985, p. 134). By asking trustees how much time they invest in orientation and training activities, and by determining to which types of activities they devote the most energies, this research helped explain what formats might be the most effective use of trustees’ time to yield the best results.
The fifth block asked about adult learning theory strategies. Knowles suggested that adults are self-directed and take on learning challenges with purpose and ownership (Smith & DeFrates-Densch, 2009). A key feature of adult learning theory is that adults oftentimes shape their own learning opportunities. Researchers described the core of self-directed learning as persons’ abilities to identify that which they do not know, and to then learn that information (Brookfield, 1986; Knowles, 1983; Thompson, 2009). Hays (2009) wrote that self-directed learning is the best way to develop both breadth and depth of knowledge. Understanding how trustees go about shaping their own learning experiences can be important in understanding how to improve orientation and training.

Figure 2. Blocking Diagram
**Criterion Variable**

The criterion or dependent variable, board use of best practices, was derived from literature describing effective community college boards of trustees (see Appendix E). Chait, Holland, and Taylor (1993) noted that effective boards of trustees did not excel in every aspect of best practice; however, effective boards demonstrated a higher overall proficiency relative to less effective boards. Best practices included setting mission and purpose; appointing, supporting and monitoring the chief executive; assessing board performance; using strategic planning; reviewing the college’s offerings; providing for resources and good stewardship; insuring institutional independence; and representing the community’s needs (Doyle, 2009; Ingram, 1995; Vaughan & Weisman, 1997a).

The measure of the criterion variable in this study, board use of best practices, was created from a new scale score based on questions that describe best practice behaviors. It is a measure of trustee behavior. The survey instrument asked 10 questions about best practices. The individual best-practice items were derived from the literature, which includes extant research, expert opinion, and professional association recommendations. Trustees were asked to rank how frequently their board does each item, using a scale ranging from 1 to 4, with 1 being the least frequent and 4 being the most frequent. The numerical representation of the criterion variable was the sum of all responses to the best practice questions.

**Data Analysis Procedures**

The responses in this study were analyzed using a blocked form of stepwise multiple regression. Multiple regression is a statistical method that examines how more than one predictor variable is related to a criterion variable. It accounts for both the effects of each
predictor variable on the criterion variable, and for the combined effects of all the predictor variables on the criterion variable (Creswel, 2005). The equation for multiple regression is \( \hat{Y} = b_1X_1 + b_2X_2 + ... + b_kX_k + a \), where \( \hat{Y} \) is the criterion variable, \( b \) is the regression coefficient for the predictor variables, and \( a \) is the constant (Hinkle, Wiersma & Jurs, 2003). A regression equation is determined using the least squares criterion in which the sum of the squared differences between the actual \( Y \) scores and the predicted \( Y \) scores is minimized.

Stepwise multiple regression is a procedure that attempts to improve the selection of predictor variables in the equation. One challenge of multiple regression is selecting predictor variables that are highly correlated to the criterion variable, yet least correlated to each other. If two predictor variables are highly related to each other, with a correlation of .90 and greater, then the two variables might effectually be the same. It is difficult to determine which variable actually has any effect on the criterion variable. This high correlation among predictor variables is defined as multicollinearity (Tabachnick & Fidell, 2001).

Prior to being entered into the blocked form of stepwise regression, data were screened using bivariate correlation. Specifically the Pearson product-moment correlation coefficient, \( r \), was calculated. It is used to measure the association between two variables (Tabachnick & Fidell, 2001). Any predictor variables with a bivariate correlation of .90 or greater were identified, and one of the redundant variables was removed prior to the data analysis. Further, bivariate correlation was performed with the individual elements that comprised the criterion variable. I found no multicollinearity among the criterion variable elements.
A different potential challenge of statistical analysis is missing data. In this study two methods were used to address missing data. One variable was deleted due to a high non-response rate, and mean substitution was used for other missing data (Tabachnick & Fidell, 2001).

The stepwise approach reviews the statistical contribution of each variable as it is entered into the regression model, compared to the contributions of each of the earlier variables. As new predictor variables enter the model, previous variables may drop out if they are no longer significant predictors of the criterion variable (Hinkle, Wiersma & Jurs, 2003). In this study, stepwise multiple regression was appropriate because several predictor variables within the input or environment blocks or both may or may not influence the single criterion variable, board use of best practices.

Statistical analysis was performed using IBM SPSS Statistics software to yield inferential statistics. The criterion variable in this study was community college board use of best practices. This was reflected in the outcome block of the I-E-O model. There were 67 predictor variables that were examined to determine if there was an influence on the criterion variable. Five blocks of environmental variables were entered into the I-E-O model. One block, the personal demographic characteristics, was entered as the input of the I-E-O model. The other four blocks of predictor variables were entered as environment components of the I-E-O model. These include institutional characteristics, content and delivery methods of trustee training programs, amount of time and types of trustee involvement in training activities, and adult learning strategies.

Data from the survey instrument were summarized using descriptive statistics, when possible. These included measures of central tendency, such as median amount of time
spent on orientation and training activities within one’s first month, and occupational category. The purpose of including descriptive statistics was to provide a concise overview of the participants and results in future reports. The variability of predictor variables, such as how many hours of training a board spends on training activities yearly, was described using standard deviation. Relative standing of variables such as types of training activities used was summarized using percentile rank.

**Study Assumptions**

This study asked community college trustees to complete an electronic survey instrument. It was the hope of this research to achieve at least a 40% participation rate of community college trustees, so that sufficient results for statistical analysis could be realized. The study assumed that trustees who participated answered the questions candidly and to the best of their knowledge. This study further assumed that community college trustees were the best persons to ask when seeking information about trustees’ participation in orientation and training, about the types of activities involved in their orientation and training, and about the practices of their boards. Finally, the study assumed that trustees were genuinely interested in learning about and improving orientation and training programs, and about board use of best practices.

**Study Limitations**

This research focused on community college boards of trustees. Therefore, it was beyond the scope of this study to generalize any results to trustees of private institutions or to four-year institutions. This study was limited by the use of adult learning theory. If trustees did not view their orientation and training as a learning activity, then they could have rejected the premise of the study out-of-hand. The largest limitation of the study
was obtaining a sufficient sample size. A challenge for this study was gaining access to the trustees. The project was still incumbent upon the assistance and goodwill of association executives in supporting the research request. Finally, a limitation of this study was the use of a sample of convenience rather than a random sample of every community college in the nation.

**Summary of Chapter Three**

Chapter three provided an overview of the methods used in this study to discover what influences, if any, do blocks of variables related to trustee orientation and training have on board use of best practices. The research questions were stated, and the research design was described. Data collection and analysis procedures were provided. The conceptual framework and theoretical foundation were included. Assumptions and limitations were reviewed.

**Overview of Upcoming Chapters**

Chapters Four and Five reports and summarizes the finding of the research, offers observations of the relevance of the findings to the research questions, and suggests future uses of the results.
Chapter Four

Results

Introduction

The results of data collection and analysis are presented in chapter four. The purpose of this study was to examine the orientation and training of community college trustees to determine their influence on board use of best practices. Results of this study may be used to better understand community college board use of best practices, and may be used in future efforts to improve trustee orientation and training activities. The research asked six questions:

1) What descriptive statistics describe community college trustee orientation and training activities?
2) What influence, if any, do the personal demographic characteristics and backgrounds of trustees have on board use of best practices?
3) What influence, if any, do institutional characteristics have on board use of best practices?
4) What influence, if any, do the content and delivery methods of trustee training programs have on board use of best practices?
5) What influence, if any, does the amount of time and types of involvement spent participating in orientation and training programs have on board use of best practices?
6) What influence, if any, do adult learning strategies have on board use of best practices?
This chapter first reviews the demographic characteristics of the survey respondents. Then descriptive statistics are presented. Next, bivariate correlation and a blocked form of stepwise regression are described. Finally, the results are presented and reviewed by block.

**Population and Respondents**

Participants in this study were community college trustees. Typical respondents have served more than eight years as a trustee on their community college boards. Respondents were most likely to be employed in educational services, professional or business fields. Almost half were elected by the public. Nearly all respondents had a bachelor’s degree or higher.

Participants were solicited through state associations of community college trustees in 25 states. The intent of using this approach was to increase the perceived legitimacy of the survey, to gain access to trustees, to increase participation, and to work within and honor any established communication protocols colleges have regarding their trustees.

Of the 25 state association directors contacted, 19 replied to the research request. Of the 19 directors who responded, two state directors considered the request, but declined. One state director agreed to participate; however, he received no response from his subsequent request to his college presidents. The request to participate and a link to the online survey instrument were sent via e-mail.

State associations of community college trustees had different procedures for contacting their trustees. Several directors indicated they do not contact trustees directly, but rather route messages through the college presidents. One state director informed the researcher they do not facilitate research or requests of any type; however, he offered to
provide the public e-mail addresses of trustees within his state. This researcher used that contact information to solicit the trustees directly. Another state director declined, stating, “feel free to contact our college presidents directly.” This researcher looked up the contact information of the 28 community colleges within that state, and contacted the presidents directly. Of that group of presidents, one replied to the request and politely explained that her trustees were relatively new and concentrating on state issues. Therefore, she was not able to forward the research request, and wished the researcher good luck. This might be indicative of trustees’ schedules and focus. Other colleges within that state responded.

The total number of potential colleges within the 16 states that made up the population was 387. The final sample of survey respondents was 253 community college trustees who serve at 146 public, two-year institutions in 16 states. The response rate by institution within the 16 collaborating states was 37.7%. One-third of the trustees in this study serve at colleges in either California or Wisconsin. Additionally, six respondents did not report the name and state of their institution. These six were not included in the response rate, as it is unknown if they are unique institutions.

The researcher estimated the total number of potential trustees at community colleges within the 16 states by looking up the number of trustees at institutions within each state. The number of board members across colleges was constant within 13 of the 16 participating states. The number of trustees on each board within California, Iowa, and Pennsylvania varied, and appeared to be representative of the community college service area. For these three states, the researcher calculated the mean number of trustees, and then used that calculation to estimate the total number of trustees for those three states.
Based on these calculations, it is estimated that there could be as many as 3,222 community college trustees in the 16 states that participated. Again, 253 trustees responded. Based on this estimated sum of potential trustees, the response rate by trustee was 7.9%. The estimated mean number of trustees per school was 8.8. However, it is not known how many of these estimated 3,222 actually received an invitation to participate, nor is it known how many vacancies exist. The responses of trustees by state, and the estimated total numbers of trustees within the 16 states are provided in Table 1.

The total number of potential colleges within the 25 states that have trustee associations was 557, as listed in the Carnegie classification system. To determine how representative the sample of 146 community colleges was of the total number of 557 colleges across all 25 states, the researcher used a chi-square test of independence. Three factors were compared, including single or multi-campus, degree of urbanization, and size. Chi-square analysis found no relationships between single or multi-campus, and between degree of urbanization. However, chi-square analysis found that there was a significant difference within the institutional characteristic of size.
### Table 1

**Trustee Participants, Summarized by State of Community College**

<table>
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<th>State</th>
<th>Trustees in sample</th>
<th>% of sample</th>
<th>Colleges in population</th>
<th>Estimated trustees per college</th>
<th>Estimated trustees in population</th>
<th>% of population</th>
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</tbody>
</table>

*Note. The number of colleges in each state includes member institutions of respective state association. The number of colleges is representative of districts, rather than campuses. The estimated number of trustees at each college in California, Iowa, and Pennsylvania are based on the mean number of trustees at colleges in state. The number of trustees in the population is estimated.*

### Descriptive Statistics

The first research question asked *what descriptive statistics describe community college trustee orientation and training activities?* To better understand the sample of trustees and the context of their institutions, this section reviewing descriptive statistics addresses research question one.
**Trustee and institutional characteristics.** Trustees in the current study provided background information about themselves. The number of years completed as a community college trustee ranged from less than one year to 57 years. As this maximum length of service was extremely long, the researcher attempted to verify the duration of that trustee’s tenure. Although a specific mention of 57 years was not readily available, an Internet search of popular and educational news media returned several trustees nationwide who have served more than 50 years. Therefore, the length of service was included in the report, rather than omitted as an outlier. The mean length of service reported was 8.6 years; the median length of service was 6 years. Trustees reported the number of other organization boards on which they currently serve, or have served in the past. The mean number of other boards was 3.2, and the median was 2. Trustees provided their highest level of education, which ranged from a high school diploma/GED to post-doctoral work. The highest frequencies were bachelor’s degree at 31.5%, master’s degree at 31.1%, and doctoral or professional degree at 20.7%. Twelve trustees declined to provide educational background information.

Trustees reported how they were selected. The plurality, 110, indicated they were elected by the public. Eighteen trustees indicated they were selected by their college’s board of trustees. These responses were distributed across nine states, including Ohio. Interestingly, in Ohio as in some other states, trustees are appointed by the governor. To speculate on this peculiar response, perhaps the incumbent trustees recruited or recommended the respondent, who was then officially appointed in another fashion. The selection method of trustees is listed in Table 2.
Table 2

*Selection Method of Trustees*

<table>
<thead>
<tr>
<th>Method</th>
<th>n</th>
<th>% of sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elected by the public</td>
<td>110</td>
<td>44.0</td>
</tr>
<tr>
<td>Appointed by governor</td>
<td>62</td>
<td>24.8</td>
</tr>
<tr>
<td>Appointed by county or local government official</td>
<td>47</td>
<td>18.8</td>
</tr>
<tr>
<td>Selected by your college’s board of trustees</td>
<td>18</td>
<td>7.2</td>
</tr>
<tr>
<td>Other</td>
<td>12</td>
<td>4.8</td>
</tr>
<tr>
<td>Appointed by state agency or system official</td>
<td>1</td>
<td>.4</td>
</tr>
<tr>
<td>Total</td>
<td>250</td>
<td>98.8</td>
</tr>
</tbody>
</table>

Trustees reported their occupation in the survey, and 229 of the 253 respondents provided that data. This study grouped trustees’ occupational category according to the North American Industry Classification System (U.S. Census Bureau, 2012). To reflect trustee responses, the researcher added two categories, “small business owner” and “retired.” These results are listed in Table 3.

The occupational categories of trustees in this study were consistent with the findings of Moltz (2009), who found that 32% of community college trustees were in the business sector, and 29% of trustees were in the education sector.
Table 3

*Occupational Category of Respondents*

<table>
<thead>
<tr>
<th>Category (example responses from survey)</th>
<th>n</th>
<th>% of sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educational Services (e.g. educator, teacher, school administrator)</td>
<td>57</td>
<td>22.5</td>
</tr>
<tr>
<td>Professional, Scientific, and Technical Services (e.g. engineer, consultant)</td>
<td>35</td>
<td>13.8</td>
</tr>
<tr>
<td>Management of Companies and Enterprises (e.g. manager)</td>
<td>30</td>
<td>11.9</td>
</tr>
<tr>
<td>Retired, no other information provided</td>
<td>22</td>
<td>8.7</td>
</tr>
<tr>
<td>Financial Activities (e.g. banker, insurance sales)</td>
<td>17</td>
<td>6.7</td>
</tr>
<tr>
<td>Other Services except Public Administration (e.g. grants administrator, community volunteer)</td>
<td>13</td>
<td>5.1</td>
</tr>
<tr>
<td>Health Care and Social Assistance (e.g. physician, doctor)</td>
<td>12</td>
<td>4.7</td>
</tr>
<tr>
<td>Small Business Owner</td>
<td>10</td>
<td>4.0</td>
</tr>
<tr>
<td>Public Administration</td>
<td>9</td>
<td>3.6</td>
</tr>
<tr>
<td>Real Estate and Rental and Leasing</td>
<td>6</td>
<td>2.4</td>
</tr>
<tr>
<td>Agriculture, Forestry, Fishing and Hunting</td>
<td>6</td>
<td>2.4</td>
</tr>
<tr>
<td>Construction</td>
<td>3</td>
<td>1.2</td>
</tr>
<tr>
<td>Trade, Transportation, and Utilities</td>
<td>3</td>
<td>1.2</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>2</td>
<td>.8</td>
</tr>
<tr>
<td>Leisure and Hospitality</td>
<td>2</td>
<td>.8</td>
</tr>
<tr>
<td>Information</td>
<td>1</td>
<td>.4</td>
</tr>
<tr>
<td>Administrative and Support and Waste Management and Remediation Services</td>
<td>1</td>
<td>.4</td>
</tr>
<tr>
<td>Not reported</td>
<td>24</td>
<td>9.5</td>
</tr>
<tr>
<td>Total</td>
<td>253</td>
<td>100</td>
</tr>
</tbody>
</table>

Trustees reported the number of hours they spent on initial orientation and training, and on continuing training. The mean and median number of hours that trustees reported spending on initial orientation and training activities was 10.1 and 5.5 hours, respectively. The mean and median number of hours that trustees reported spending each month on continuing training was 1.8 and 1 hours, respectively. Trustees reported that their
colleges provided different training options. Frequencies of available college training programs, as reported by trustees, are summarized in Table 4. Although a significant correlation was not found with the criterion variable, 55 of the 253 trustees indicated their college offers no training in any of these three formats: a trustee training program, a written training guide, or a trustee mentoring program. These 55 respondents serve at 43 different colleges. Conversely, 19 trustees from 16 colleges reported their schools offer all three formats of training activities.

Table 4

<table>
<thead>
<tr>
<th>Training activity</th>
<th>n</th>
<th>% of sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trustee training program</td>
<td>171</td>
<td>67.9</td>
</tr>
<tr>
<td>Written training guide</td>
<td>83</td>
<td>33.2</td>
</tr>
<tr>
<td>Trustee mentoring program</td>
<td>49</td>
<td>19.7</td>
</tr>
</tbody>
</table>

Trustees reported how many times per week they communicate with other trustees, with a mean of 1.2 times per week. Similarly, trustees reported how many times per week they communicate with the college CEO, with a mean of 1.7 per week. Given the higher mean, it appeared that trustees communicate with the college CEO more frequently than they do with other trustees.

More than 100 trustees took the opportunity to write responses to the five open-ended questions on the survey instrument. These questions included

- during trustee training programs: what topics were covered, other;
- during training activities, what learning strategies did you use, other;
- what would you have liked to learn in training that was absent;
• what activities, if any, should your board stop doing; and
• any other comments you want to share.

The open-ended responses were not included in the descriptive statistics or predictive analysis. However, the responses may provide valuable information for future research. Twenty-nine trustees responded to the first open-ended question, during trustee training programs: what other topics were covered. Six trustees wrote they received most or all of their training from the state or a state association. Twenty-seven trustees responded to the second open-ended question, during training activities what other learning strategies did you use? Three trustees indicated they met with the board chairperson. One hundred and three trustees provided responses to the third open-ended question, what would you have liked to learn in training that was absent? Eleven responses related to the roles of trustees. Eleven trustees also indicated they wanted more information related to finances. One hundred and seven trustees offered statements of what their board should stop doing. Ten responses were related to micro-managing. Seventy-four trustees offered additional comments to the prompt any other comments you want to share? Eight trustees offered ideas on what they feel the board and/or college needs to do. The full responses are included in Appendix H.

Criterion Variable Elements

The survey asked trustees 10 questions regarding their use of best practices, as determined by higher education researchers, experts, trade associations, or governing bodies. Each question was presented on a Likert-type scale from 1 to 4, with 1 indicating none of the time, and 4 indicating all of the time. The variables with the three largest mean scores were related to the college’s CEO, with the top three scores of $X=3.87$,
\( \bar{X} = 3.83 \), and \( \bar{X} = 3.69 \). Of the 10 questions, the variable with the lowest mean score, \( \bar{X} = 2.96 \), was *reviewing the long-term priorities of the college*. One question, *use of Policy Governance®*, had 24 missing responses. Due to that large number of missing responses, the variable was removed from the computed scale score and subsequent analysis. For the remaining 9 questions, the mean response was substituted for any missing data. Descriptive statistics for all criterion variable questions are included in Table 5.

The total final combined scale score of the nine questions for the criterion variable ranged from 9 to 36, with a higher score indicating more frequent use of best practices. This aggregate score was used to represent the dependent variable, board use of best practices. The mean of this combined scale score was 31.8, with a standard deviation of 3.4. Individual best practice elements contained in the survey instrument are listed in Appendix D, within the section entitled “outcomes block.”

Table 5

<table>
<thead>
<tr>
<th>Survey Question</th>
<th>N</th>
<th>Min</th>
<th>Max</th>
<th>Mean</th>
<th>Std Dev</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluate the CEO annually</td>
<td>250</td>
<td>1</td>
<td>4</td>
<td>3.87</td>
<td>.43</td>
</tr>
<tr>
<td>Appoint the CEO, as required</td>
<td>251</td>
<td>1</td>
<td>4</td>
<td>3.83</td>
<td>.56</td>
</tr>
<tr>
<td>Set goals and expectations for the CEO</td>
<td>252</td>
<td>1</td>
<td>4</td>
<td>3.69</td>
<td>.61</td>
</tr>
<tr>
<td>Monitor college finances (income statements, balance sheets, cash flow statements)</td>
<td>252</td>
<td>1</td>
<td>4</td>
<td>3.61</td>
<td>.69</td>
</tr>
<tr>
<td>Ensure adequate resources</td>
<td>248</td>
<td>2</td>
<td>4</td>
<td>3.55</td>
<td>.63</td>
</tr>
<tr>
<td>Respect the legitimate roles and responsibilities of other stakeholders</td>
<td>250</td>
<td>1</td>
<td>4</td>
<td>3.55</td>
<td>.59</td>
</tr>
</tbody>
</table>
Advocate for community college issues at the local, state or federal level  250  1  4  3.41  .75
Rely on the college’s mission, values, and traditions as a guide for decisions  252  2  4  3.31  .67
Use principles of Policy Governance®  229  1  4  3.00  1.05
Review the long-term priorities for the college  251  1  4  2.96  .79

Data Preparation

Survey responses were entered into IBM SPSS Statistics software. The researcher looked up the IPEDS Unit ID of each institution, based on the colleges’ name and city as provided by trustees on their surveys. The institutional Unit IDs were entered into SPSS. Institutional characteristic data from IPEDS and from the Carnegie classification system were added to the SPSS data, and matched by the Unit ID. Five survey questions were recoded to allow for reverse scoring. Survey responses to three questions, how were you selected as a community college trustee, what is your occupation, and Carnegie classification region, were recoded into dummy variables for analysis.

Initial Data Screening Using Bivariate Correlation

Bivariate correlation measures the size and direction of the linear relationship between two variables. Prior to entering data into the regression analysis, this study used bivariate correlation analysis to identify issues with multicollinearity. Two redundant variables describing institutional size were removed from the analysis. The bivariate correlation analysis identified 12 predictor variables that had a statistically significant relationship with the criterion variable at the p < .05 level or greater. The 12 variables, including their respective data analysis block, are summarized in Table 6.
Table 6

Initial Data Screening Using Bivariate Correlation

<table>
<thead>
<tr>
<th>Variable</th>
<th>Block</th>
<th>r</th>
</tr>
</thead>
<tbody>
<tr>
<td>Life experiences have prepared them to serve as a trustee</td>
<td>5</td>
<td>.19**</td>
</tr>
<tr>
<td>Identifying what one knows and what one still needs to learn</td>
<td>5</td>
<td>.18**</td>
</tr>
<tr>
<td>The learning needs of communities</td>
<td>3</td>
<td>.17**</td>
</tr>
<tr>
<td>College history and traditions</td>
<td>3</td>
<td>.17**</td>
</tr>
<tr>
<td>Communicating with the college CEO</td>
<td>4</td>
<td>.15*</td>
</tr>
<tr>
<td>Southeast Region</td>
<td>2</td>
<td>.15*</td>
</tr>
<tr>
<td>Business and industry needs</td>
<td>3</td>
<td>.14*</td>
</tr>
<tr>
<td>College finances and budgeting process</td>
<td>3</td>
<td>.13*</td>
</tr>
<tr>
<td>Culture of the board</td>
<td>3</td>
<td>.13*</td>
</tr>
<tr>
<td>Talking with state or system employees</td>
<td>5</td>
<td>-.12*</td>
</tr>
<tr>
<td>Attended workshops provided by trustee associations</td>
<td>5</td>
<td>-.15*</td>
</tr>
<tr>
<td>Elected by the public</td>
<td>1</td>
<td>-.17**</td>
</tr>
</tbody>
</table>

*p<.05, **p<.01

Blocked Stepwise Regression Analysis of Data and Findings

A blocked form of stepwise regression analysis was conducted to determine what influence, if any, community college trustee orientation and training had on board use of best practices. In this study, best practices were defined as actions or processes that have been recognized by higher education researchers, experts, trade associations, or governing bodies as highly effective or exemplary. The criterion variable, best practices, was a scale score made up of nine survey items. The combined scale score for the criterion variable ranged from 9 to 36. The mean of this combined scale score was 31.8, and the standard deviation was 3.4.
Predictor variables were grouped into five blocks. The first block of predictor variables asked personal demographic and background questions of the trustees, and was entered in the input characteristics block. The second block of predictor variables included institutional characteristics. This information was entered into the statistical analysis in the first environmental block. The third block of predictor variables asked questions related to the content of trustee orientation and training programs. This information was entered in the second environmental block of the regression analysis. The fourth block of predictor variable questions asked about the amount of time and types of involvement of trustees in orientation and training activities. This was entered as the third environmental block. The fifth block of predictor variables asked about adult learning practices and strategies. This information was entered in the fourth environmental block within the analysis.

A total of 67 predictor variables were entered into the IBM SPSS Statistics software. Predictor variables were grouped into five blocks, and entered in the following order:

- Block 1, Personal demographic and background characteristics of trustees (25 variables);
- Block 2, Institutional characteristics (5 variables);
- Block 3, Content of trustee training programs (19 variables);
- Block 4, Time and types of involvement of trustees in training activities (13 variables); and
- Block 5, Adult learning strategies and delivery methods (5 variables).
The criterion variable, board use of best practices, was a scale score computed from 9 best-practice variables. Predictor variables are listed by block in Table 7. The blocking design is pictured in Figure 1.

Table 7

*Predictor Variables Listed by Block*

<table>
<thead>
<tr>
<th>Block 1, Input Block - Personal demographic and background characteristics of trustees</th>
</tr>
</thead>
<tbody>
<tr>
<td>How were you selected as a community college trustee?</td>
</tr>
<tr>
<td>Appointed by governor</td>
</tr>
<tr>
<td>Appointed by state or system</td>
</tr>
<tr>
<td>Appointed by county or local government official</td>
</tr>
<tr>
<td>Elected by the public</td>
</tr>
<tr>
<td>Selected by your college’s board of trustees</td>
</tr>
<tr>
<td>What is your occupation?</td>
</tr>
<tr>
<td>Educational services</td>
</tr>
<tr>
<td>Professional scientific and technical services</td>
</tr>
<tr>
<td>Retired</td>
</tr>
<tr>
<td>Management of companies and enterprises</td>
</tr>
<tr>
<td>Finance and insurance</td>
</tr>
<tr>
<td>Health care and social assistance</td>
</tr>
<tr>
<td>Other services (except public administration)</td>
</tr>
<tr>
<td>Administrative and support and waste management and remediation services</td>
</tr>
<tr>
<td>Small business owner</td>
</tr>
<tr>
<td>Public administration</td>
</tr>
<tr>
<td>Real estate and rental and leasing</td>
</tr>
<tr>
<td>Agriculture, forestry, fishing and hunting</td>
</tr>
<tr>
<td>Construction</td>
</tr>
<tr>
<td>Trade transportation and utilities</td>
</tr>
<tr>
<td>Manufacturing</td>
</tr>
</tbody>
</table>

77
Leisure and hospitality

Information

Your highest education attained?
How many years have you completed as a community college trustee?
On how many other boards have you served or currently serve?

Block 2, Environment Block 1 - Institutional characteristics

IPEDS_12 month unduplicated headcount
IPEDS tuition and fees
Carnegie geographic region
Carnegie degree of urbanization
Carnegie single or multi-campus

Block 3, Environment Block 2 - Content of trustee training programs

Does your college offer a trustee-training program? If so, what topics are covered?

College history and traditions
College programs and services
College organizational structure
College finances and budgeting process
Roles as an individual trustee
Roles of the board as a whole
Culture of the board
Board meetings and board operations
Business and industry overview
Higher education as compared to other sectors
External trends and issues
State or federal policies related to higher education
Advocacy
Fundraising
Human relation skills
The learning needs of your community

Does your board have a written training guide?
Does your board have a trustee-mentoring program?

Block 4, Environment Block 3 – Time and types of involvement of trustees in training activities

As a new trustee how many hours did you spend on initial orientation activities?
After your initial orientation, how many hours per month on average do you spend on training activities?
How many times do you communicate with other board members each week?
How many times do you communicate with the CEO each week?
During training activities, what learning strategies did you use?
  - Read printed materials
  - Participated in classroom-style sessions
  - Reviewed audio- or video-tapes
  - Reviewed online materials
  - Talked with other current trustees
  - Talked with past trustees
  - Talked with the CEO or other college employees
  - Talked with state or system employees
  - Attended workshops provided by the state
  - Attended workshops provided by trustee associations

Block 5, Environmental Block 4 – Adult learning strategies and delivery methods

To what extent do the following statements describe you?
  - I am able to identify what I know and what I still need to learn.
  - My life experiences have prepared me to serve as a trustee.
  - I learn about being a trustee by doing it.
  - As a trustee, I focus learning on immediate or pressing issues.
  - As a trustee, I learn general information about higher education.

The blocked form of stepwise regression permitted this researcher to determine if any of the predictor variables were significant at the p<.05 level. Six of the 67-predictor variables were found to be significant predictors of the criterion variable, board use of
best practices. The adjusted $R^2$ was .14, meaning that 14% of the variance in the criterion variable, board use of best practices, could be explained by the predictor variables. The results of the blocked form of stepwise regression are displayed in Table 8. Two negative correlations were revealed in the final regression analysis, being elected by the public, and attending workshops offered by trustee associations. These questions were specifically asked on the survey in the context of “during training activities.”

The first column in Table 8, Variable Name, names the predictor variables. The second column, Block, is the data analysis block in which the predictor variable was entered into the stepwise regression model. The third column, Zero $r$, is the Pearson product moment correlation coefficient of the predictor variable with the dependent variable, board use of best practices. The fourth column, Step $\beta$, is the beta weight of the predictor variable at the time it entered the regression model as significant. The Beta weight is the regression coefficient in standard score form. The fifth column, $\beta$, is the final beta weight of the predictor variable in the final model. The last column, F, is the F ratio or the ratio of two variance estimates, used in ANOVA to accept or reject the null hypothesis.

### Table 8

**Significant Predictor Variables of Board Use of Best Practices**

<table>
<thead>
<tr>
<th>Variable Name</th>
<th>Block</th>
<th>Zero $r$</th>
<th>Step $\beta$</th>
<th>$\beta$</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elected by the public</td>
<td>Personal demographic and background</td>
<td>-.17**</td>
<td>-.17**</td>
<td>-.13*</td>
<td>7.56**</td>
</tr>
<tr>
<td>The learning needs of communities</td>
<td>Content and delivery methods</td>
<td>.17**</td>
<td>.16**</td>
<td>.21***</td>
<td>7.26***</td>
</tr>
<tr>
<td>Attended workshops</td>
<td>Time and types</td>
<td>-.15*</td>
<td>-.17**</td>
<td>-.19**</td>
<td>8.30***</td>
</tr>
<tr>
<td>Provided by Trustee Associations</td>
<td>Number of Times Communicate with the College CEO</td>
<td>Time and Types of Involvement</td>
<td>.15*</td>
<td>.15*</td>
<td>.13*</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>-----------------------------------------------</td>
<td>-------------------------------</td>
<td>------</td>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td>Identifying What One Knows and What One Still Needs to Learn</td>
<td>Adult Learning Strategies</td>
<td>.18**</td>
<td>.20***</td>
<td>.16**</td>
<td>7.93***</td>
</tr>
<tr>
<td>Life Experiences Have Prepared Them to Serve as a Trustee</td>
<td>Adult Learning Strategies</td>
<td>.19**</td>
<td>.13*</td>
<td>.13*</td>
<td>7.76***</td>
</tr>
</tbody>
</table>

Note: Sample size n=253, Adjusted R²=.14, *p<.05, **p<.01, ***p<.001

**Review of Significant Predictor Variables by Block**

Block 1 represented the input block in the I-E-O data analysis model. It contained 25 variables that described the personal demographic and background characteristics of trustees. This block addressed the research question, what influence, if any, do the personal demographic characteristics and backgrounds of trustees have on board use of best practices? One of the personal demographic and background block variables, *elected by the public* (β=-.13, p<.05), was significant in the final model. The results suggest there is a negative relationship between being elected by the public and board use of best practices.

Block 2 represented the first environment block in the I-E-O data analysis model. It contained five variables that described institutional characteristics. This block addressed the research question, what influence, if any, do institutional characteristics have on board use of best practices? These variables were taken from IPEDS and the Carnegie classification system. None of the institutional characteristic variables were significant in the final model.
Block 3 represented the second environment block in the I-E-O data analysis model. It contained 19 variables that described content and delivery methods of trustee training programs. This block addressed the research question, what influence, if any, do the content and delivery methods of trustee-training programs have on board use of best practices? One variable, *the learning needs of communities* ($\beta=.21, p<.001$), was significant in the final model. The results suggest there is a positive relationship between trustees who indicated they reviewed the learning needs of their communities during training activities and board use of best practices.

Block 4 represented the third environment block in the I-E-O data analysis model. It was comprised of 13 variables that described the quantity and the quality of the involvement of trustees in training activities. This block addressed the research question, what influence, if any, does the amount of time and types of involvement spent participating in orientation and training programs have on board use of best practices? Two variables were significant in the final model, *how many times trustees communicate with the college CEO each week* ($\beta=.13, p<.05$), and *attended workshops provided by trustee associations* ($\beta=-.19, p<.01$). The results suggest there is a positive relationship between trustees communicating with the CEO and board use of best practices. However, the results suggest there is a negative relationship between attending workshops provided by trustee associations and board use of best practices.

Block 5 represented the fourth environment block, adult learning strategies and delivery methods. It contained five predictor variables. Two variables were significant in the final model: trustees identifying *what they know and what they still need to learn* ($\beta=.16, p<.01$), and trustees’ *life experiences have prepared them to serve* ($\beta=.13, p<.05$).
The results suggest there is a positive relationship between both these variables and board use of best practices.

In the final model two predictor variables, *attended workshops provided by trustee associations* and *elected by the public*, were negatively associated with the criterion variable. This researcher wants to emphasize regression analysis does not imply cause and effect, but rather seeks to determine if relationships exist between one criterion variable and several predictor variables. It is not the conclusion of this researcher that workshops provided by trustee associations or being elected by the public are anything but helpful. One possible explanation of these negative relationships might be rooted in a combination of involvement theory and adult learning theory – namely that one of the most effective forms of involvement is with peers, and that adult learners know what they know and that which they do not know. Therefore, it might be possible that as trustees recognize they do not know a particular topic or subject, they reach out to peers and to workshops offered by associations to seek answers, enlightenment, and better practices. This will be further addressed in chapter five. The model summary is presented in Table 9.
Table 9

Model Summary

<table>
<thead>
<tr>
<th>Model predictors added cumulatively</th>
<th>R</th>
<th>R Square</th>
<th>Adjusted R Square</th>
<th>Std. Error of the Estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1  Elected by the public</td>
<td>.17</td>
<td>.03</td>
<td>.03</td>
<td>3.39</td>
</tr>
<tr>
<td>2  Elected by the public, The learning needs of your community</td>
<td>.23</td>
<td>.06</td>
<td>.05</td>
<td>3.35</td>
</tr>
<tr>
<td>3  Elected by the public, The learning needs of your community, How many times trustees communicate with the college CEO each week</td>
<td>.27</td>
<td>.07</td>
<td>.06</td>
<td>3.33</td>
</tr>
<tr>
<td>4  Elected by the public, The learning needs of your community, How many times trustees communicate with the college CEO each week, Trustees identifying what they know and what they still need to learn</td>
<td>.34</td>
<td>.11</td>
<td>.10</td>
<td>3.26</td>
</tr>
<tr>
<td>5  Elected by the public, The learning needs of your community, How many times trustees communicate with the college CEO each week, Trustees identifying what they know and what they still need to learn, Attended workshops provided by trustee associations</td>
<td>.38</td>
<td>.14</td>
<td>.13</td>
<td>3.21</td>
</tr>
<tr>
<td>6  Elected by the public, The learning needs of your community, How many times trustees communicate with the college CEO each week, Trustees identifying what they know and what they still need to learn, Attended workshops provided by trustee associations, Trustees’ life experiences have prepared them to serve</td>
<td>.40</td>
<td>.16</td>
<td>.14</td>
<td>3.19</td>
</tr>
</tbody>
</table>
To determine if being elected by the public and attended workshops offered by trustee associations were related to other predictor variables, further bivariate correlation was conducted. Select bivariate correlation results with being elected by the public are included in Table 10. Negative correlations with other Block 1 personal demographic and background characteristics selection methods are excluded from this table. Select bivariate correlation results with attended workshops offered by trustee associations are included in Table 11. Numerous positive relationships with other Block 3 content of trustee training programs are omitted. These relationships are discussed in Chapter Five.

Table 10

Bivariate Relationships with Elected by the Public and Select Predictor Variables

<table>
<thead>
<tr>
<th>Variable Name</th>
<th>r</th>
</tr>
</thead>
<tbody>
<tr>
<td>Far West Region</td>
<td>.35**</td>
</tr>
<tr>
<td>Unduplicated headcount</td>
<td>.24**</td>
</tr>
<tr>
<td>Written training guide</td>
<td>.21**</td>
</tr>
<tr>
<td>Attend workshops offered by state associations</td>
<td>.17**</td>
</tr>
<tr>
<td>Hours per month training after initial training</td>
<td>.15*</td>
</tr>
<tr>
<td>Hours spent on initial orientation</td>
<td>.15*</td>
</tr>
<tr>
<td>Talked with state or system employees</td>
<td>.13*</td>
</tr>
<tr>
<td>Management of companies or enterprises</td>
<td>-.13*</td>
</tr>
<tr>
<td>College history and traditions</td>
<td>-.20**</td>
</tr>
<tr>
<td>Mid-East Region</td>
<td>-.26**</td>
</tr>
<tr>
<td>Great Lakes Region</td>
<td>-.26**</td>
</tr>
<tr>
<td>Southeast Region</td>
<td>-.35**</td>
</tr>
<tr>
<td>Tuition and fees</td>
<td>-.37**</td>
</tr>
<tr>
<td>Great Plains Region</td>
<td>-.45**</td>
</tr>
</tbody>
</table>

*p<.05, **p<.01
Table 11

_Bivariate Relationships with Attended Workshops Offered by Trustee Associations and Select Predictor Variables_

<table>
<thead>
<tr>
<th>Variable Name</th>
<th>r</th>
</tr>
</thead>
<tbody>
<tr>
<td>Far West Region</td>
<td>.21**</td>
</tr>
<tr>
<td>Hours per month training after initial orientation</td>
<td>.21**</td>
</tr>
<tr>
<td>Hours spent on initial orientation</td>
<td>.19**</td>
</tr>
<tr>
<td>Mid-East Region</td>
<td>-.13*</td>
</tr>
<tr>
<td>Management of companies or enterprises</td>
<td>-.14*</td>
</tr>
<tr>
<td>Trustee mentoring program</td>
<td>-.15*</td>
</tr>
<tr>
<td>Appointed by governor</td>
<td>-.15*</td>
</tr>
<tr>
<td>Small business owner</td>
<td>-.16**</td>
</tr>
<tr>
<td>Tuition and fees</td>
<td>-.20**</td>
</tr>
<tr>
<td>Does your college offer a training program</td>
<td>-.34**</td>
</tr>
</tbody>
</table>

*p<.05, **p<.01

**Summary of Chapter Four**

This chapter presented the results of research on community college trustee orientation and training influences on board use of best practices. First, descriptive statistics were presented. The sample of community college trustees who participated in this survey was described. A total of 253 trustees from 146 colleges in 16 states participated. The occupational category and educational level of the current participants were similar to that found in other trustee summaries. The mean number of hours trustees reported spending on initial orientation and training activities was 10.1 hours. The mean number of hours trustees reported spending each month on continuing training was 1.8 hours. Descriptive statistics and the results of bivariate analysis were presented next.
The current project used a blocked form of stepwise regression to analyze the data in response to four additional research questions. Six predictor variables, in combination, accounted for an adjusted $R^2 = .14$ or 14% of the variance in the criterion variable, board use of best practices. These six variables were elected by the public, the learning needs of trustees’ communities, how many times trustees communicate with the college CEO each week, attended workshops provided by trustee associations, identifying what trustees know and what they still need to learn, and trustees’ life experiences have prepared them to serve. The results of the regression analysis were presented, and reviewed by block.

**Overview of Upcoming Chapter**

Chapter Five discusses the results of this research. It reviews the predictor variables by block. Then the chapter discusses implications for theory and practice, offers recommendations for future research, identifies limitations, and discusses the contributions of this study to the literature.
Chapter Five

Discussion, Recommendations and Conclusion

Introduction

Chapter Four provided descriptive statistics of the sample, presented the results of bivariate analysis, and presented the results of a blocked form of stepwise regression. Chapter Five reviews the results by block, and discusses the significant predictors of the criterion variable. Limitations of the current study are reviewed. This chapter then offers implications for theory and practice. Finally, recommendations for future research, conclusions, and contributions are offered.

Restatement of the Purpose of the Study

This study researched the orientation and training of community college trustees. The purpose of this dissertation was to discover what influence, if any, do predictor variables related to community college trustee orientation and training have on board use of best practices. Categories of predictor variables included types of orientation and training, the personal demographic characteristics of community college trustees, the content and delivery method of orientation and training, the time and types of involvement of trustees, and adult learning strategies. The time of involvement was measured both by the number of hours trustees spent on training activities, and by the frequency of their interactions with the college’s CEO. The types of involvement were measured by the various learning strategies used by trustees. The criterion variable in this study was community college board use of best practices. Best practices were defined as actions or processes that have been recognized by higher education researchers, experts, trade associations, or governing bodies as highly effective or exemplary.
The theoretical frameworks for this study were Astin’s involvement theory and adult learning theory. The conceptual model guiding the data analysis was Astin’s input-environment-output (I-E-O) model. A form of blocked, stepwise regression was used to analyze the data. The literature guided the grouping of predictor variables into five blocks, which addressed five of the six research questions. The sixth research question asked about descriptive statistics of the trustees and their processes, which were gathered in the survey to offer general information.

This study combined aspects of trustee training and adult learning. National and state trustee associations, higher education associations, researchers, and experts have described what elements constitute an effective training program for community college trustees. Similarly, numerous studies exist on how adults learn. However, research was not available that combined these two elements. It was the intent of this study to investigate whether community college trustee training activities, using the lens of adult learning theory and Astin’s involvement theory, had any influence on board use of best practices. This study provided that information, and added to the literature that describes community college trustee orientation and training. Training professionals, colleges, and trustee associations can use the data-driven knowledge from this study. Trustees may also use this research to better understand their own learning expectations, methods, and participation levels in various learning activities.

Discussion of Findings

Predictor variables were blocked in five groups and entered into the stepwise regression analysis in this order: personal demographic and background characteristics of trustees, institutional characteristics, content of trustee-training programs, time and
types of involvement of trustees in training activities, and adult-learning strategies and
delivery methods. A total of 67 predictor variables were entered into the model within
those five blocks. Six variables were found to be significant predictors of the criterion
variable, board use of best practices. These variables included: elected by the public, the
learning needs of communities, attended workshops offered by trustee associations, how
many times trustees communicate with the CEO each week, identifying what they know
and what they still need to learn, and life experiences have prepared them to serve.
These predictor variables are listed by block in Table 7.

The criterion variable, board use of best practices, was a scale score made up of nine
survey questions. These questions were grouped into three categories, as directed by
themes in the literature: the strategic direction and governance of the institution; the
fiduciary responsibility of the institution; and the working relationship with the CEO that
when effective, fosters mutual success.

The criterion variable was initially comprised of 10-survey questions. One question,
use of Policy Governance®, had 24 missing responses, and was removed from the scale
score, yielding the nine survey questions. The Policy Governance® method is regarded
as a best practice (Carver & Carver, 1997). However, Potter and Phelan (2008) reported
that only 15% of community colleges used this method. The high rate of non-response
to this question in the current research may reflect the low adoption rate of this particular
governance model overall. It may also reflect a level of unfamiliarity with the method.

Research question one. The first research question asked what descriptive statistics
describe community college trustee orientation and training activities. These results were
presented in Chapter Four. In the current study, 67.9% of trustees reported their college
offers some type of trustee-training program. This is consistent with Davis (1997), who reported that 70% of community colleges offer a trustee-training program. Trustees reported lower frequencies of written training guides, 33.2%, and trustee-mentoring programs, 19.7%. The Association of Governing Boards (2009) reported that 65% of trustees spent half a day or less on initial orientation activities. The median number of hours spent on initial orientation in this study was 5.5 hours, slightly more than half a day. However, 36.4% of trustees in this study reported spending 4 hours or less on initial orientation.

**Research question two.** The second research question asked what influence, if any, do the personal demographic characteristics and backgrounds of trustees have on board use of best practices. Six survey questions were asked to describe the trustees. These survey questions included *how were you selected as a community college trustee, how many years have you completed as a community college trustee, on how many other boards have you served or currently serve, what is your occupation, what is your highest education attained, and any other comments you want to share?* The first five of these survey questions, which contained 25-separate variables, were entered into the first block of the regression analysis model. This was the input block. Responses to the sixth survey question were separated out, and are summarized in Appendix H.

One of the personal demographic and background variables, *how were you selected - elected by the public*, was a significant predictor in the final model. However, it had a negative influence on the criterion variable, board use of best practices. Future research is needed to better understand this finding.
In many regards the sample of trustees in the current study was similar to findings in existing research (Moltz, 2009; Vaughan & Weisman, 1997a). In the current study, 44% of the sample reported being elected by the public. This compared to previous studies that found 40% of community college trustees were elected (Mangan, 2010). The sample in the current study was similar in terms of occupation and highest level of education attained. The bachelor’s degree attainment rate in the current study was 31.5%; master’s degree completion rate was 31.1%; and professional or terminal degree completion rate was 20.7%. The combination of these, 83.3%, yielded an education attainment rate similar to previous studies that reported 87% of trustees hold a bachelor’s degree or higher (Bontrager, 2010). The top two occupational categories in this study were business-related, 30.5%, and education, 22.5%, as categorized using the North American Industry Classification System (U.S. Census Bureau, 2012). This was close to previous studies that reported 32% of trustees work in the business sector, and 29% in the education sector (Moltz, 2009). In the current study only 8.7% identified being retired, with no further information provided.

Other demographic information reported in Chapter Four included mean and median years of service, hours of ongoing monthly training, and weekly contacts with other trustees and the college CEO. Weerts and Ronca (2008) found that most non-profit board members serve on multiple boards. That was true in the current study, as trustees reported serving on, or having served on, a mean of 3.2 boards.

The current study did not ask for other demographic characteristics, such as trustee gender, age, ethnicity, and income. None of those variables were identified in adult learning theory or involvement theory as relevant factors to learning or to involvement.
Moreover, previous studies have already created a profile of community college trustees (Vaughan & Weisman, 1997a), which was not the intent of this study. A general profile of trustees was included in Chapter Two.

The community colleges at which the sample of trustees served differed in terms of institutional size from the population of community colleges. Chi-square analysis was performed to compare the sample to the population. Institutional characteristic data fields were taken from the Carnegie classification system and from IPEDS. Trustees in this study appeared to serve at institutions that are larger than those in the population as a whole. This may be attributed to the large number of institutions from the State of California in the sample, a state that has numerous large institutions. Future research should take into consideration the size of the sample institutions when discussing how to apply any findings to other institutions, especially to smaller institutions.

**Research question three.** The third research question asked what influence, if any, do institutional characteristics have on board use of best practices. These institutional characteristics were entered into Block 2, and were the first environment block. These five predictor variables were taken from IPEDS and the Carnegie classification system. They included single- or multi-campus, geographic region, degree of urbanization, 12-month unduplicated headcount, and tuition and fees. None of these institutional characteristic variables were significant in the final model.

**Research question four.** The fourth research question asked what influence, if any, do the content and delivery methods of trustee training have on board use of best practices. These variables were presented as options on the current survey instrument regarding the topics covered in trustee-training programs. Responses to this question
were entered into Block 3, and included 19-predictor variables. This information was entered in the second environment block of the stepwise regression analysis. Variables included *does your college offer a trustee training program, college history and traditions, college programs and services, college organizational structure, college finances and budgeting process, roles as an individual trustee, roles of the board as a whole, culture of the board, board meetings and board operations, business and industry overview, higher education as compared to other sectors, external trends and issues, state or federal policies related to higher education, advocacy, fundraising, human-relation skills, the learning needs of your community, does your board have a written training guide, and does your board have a trustee-mentoring program.*

One variable from the content and delivery methods of trustee-training programs block was found to be significant in the final model, *the learning needs of trustees’ communities.* This predictor variable had a positive influence on the criterion variable, board use of best practices. Previous research has indicated that understanding one’s community is important to college trustees. Mangan (2010) described the importance of community colleges’ work with business and industry in providing relevant job-related education and training. Coleman (1981) found that trustees identified meeting the needs of their community as important. Similarly, Shults (2001) reported community college trustees are accountable to serving the needs of their communities. He wrote that most community college trustees live within their college’s local community. In 2005, the American Association of Community Colleges surveyed their trustee members. In the survey responses, trustees reported feeling increased pressure to respond to the learning needs of their communities. During the 2007 Community College Futures Assembly,
trustees and presidents reported that “meeting community needs” (p. 863) would be important in meeting future accountability expectations and assessment requirements. The report stated collaborating with others in the community would be critical in meeting their needs (Basham, 2008).

Understanding the learning needs of one’s community is vital to trustees so that they can lead their colleges more effectively. The finding of the current research supports the literature by confirming its positive influence on board use of best practices.

**Research question five.** The fifth research question asked what influence, if any, does the amount of time and types of involvement spent participating in orientation and training programs have on board use of best practices. Time was measured in both hours of training and in frequencies of interactions with the CEO and others. Types of involvement were recorded as orientation and training activities. Responses were entered into Block 4. These 14 variables were entered in the third environment block within the analysis. Astin’s involvement theory and expert recommendations informed the selection of the variables. These included *during training activities read printed materials, participated in classroom-style sessions, reviewed online materials, talked with other current trustees, talked with past trustees, talked with the CEO or other college employees, talked with state or system employees, attended workshops provided by the state, attending workshops provided by trustee associations, as a new trustee how many hours did you spend on initial orientation activities, after your initial orientation how many hours per month on average do you spend on training activities, how many times do you communicate with other board members each week, and how many times do you communicate with the CEO each week.*
Two variables were found to be significant in the final model. These were trustees attending workshops provided by trustee associations, and how many times trustees communicate with the college CEO each week. Attended workshops offered by trustee associations was a negative predictor of board use of best practices, and Communicating with the CEO was a significant positive predictor.

The significant predictor, communicating with the college’s CEO, confirmed the findings of earlier studies that highlighted the importance of the trustee-CEO relationship. Numerous researchers and experts have emphasized the importance of the trustee-CEO relationship (Boggs, 2011; Perkins, 2012; White, 2011). Vaughan and Weisman reported 93% of trustees stated they received most of their information from the college’s president or his staff (1997). In the current study, 67.3% of trustees reported communicating with their CEO at least once per week. For the purposes of this study, I am considering communicating with the CEO to be a type of trustee orientation and ongoing training. Although this might be seen as an informal type of training, it was reported to occur with regularity and at a high rate among trustees in the study. The finding in the current study that communicating with the CEO positively influences board use of best practices supports the literature on the involvement of trustees with CEOs.

The negative beta weight of attending workshops provided by trustee associations was not anticipated. It is important to recall that multiple regression is a “set of statistical techniques that allow one to assess the relationship between one dependent variable and several independent variables” (Tabachnik and Fidell, 2001, p. 111). It does not prove any temporal or cause and effect relationship, but it does allow causal inferences to be made. The size of the beta weight actually increased from the step that this variable
entered the model to the final step, which is atypical in regression studies. The Beta increased from -.169 to -.183 when the predictor communicating with the CEO was added; and further to -.187 when life experience has prepared me to serve was added. The negative influence could be a result of numerous factors, including the modest sample size in this study. Regardless, this finding should be explored in future research to better understand its causes and implications.

To attempt to better understand the two-predictor variables, attended workshops offered by trustee associations and elected by the public that had negative correlations with the criterion variable, I ran additional bivariate correlations among the predictor variables. In both cases, no clear patterns emerged that might help further explain the relationships among the variables, or that would help create a profile of the variables. For the purposes of this study, these two variables did not support the overall theoretical framework. Future researchers might be able to identify the factors contributing to these counterintuitive relationships.

**Research question six.** The sixth research question asked what influence, if any, do adult learning strategies have on board use of best practices. These responses were entered into Block 6, and were the fourth-environment block. The following five-predictor variables were asked of trustees: *I am able to identify what I know and what I still need to learn, my life experiences have prepared me to serve as a trustee, I learn about being a trustee by doing it, as a trustee I focus learning on immediate or pressing issues, and as a trustee I learn general information about higher education.*

Two variables were found to be significant in the final model. These were *I am able to identify what I know and what I still need to learn,* and *my life experiences have
prepared me to serve as a trustee. Both had a positive influence on the criterion variable, board use of best practices. These two significant factors are rooted in adult learning theory (Amstutz, 1999; Baldwin-Evans, 2006; Hansman, 2001; Mezirow, 1991).

In the current study, adult-learning theory was used in combination with involvement theory in order to examine board use of best practices. The reason the current researcher selected adult-learning theory was to try to understand how trustees actually learn or process the information in their orientation and training. As trustees are adults, that paradigm was the most directly relevant to the population. As this study examined the impact of orientation and training, which are learning-based activities, it needed a lens through which that aspect could be investigated.

Adults learn, in part, by doing or experiencing things, having interactions with others, and by being active participants. Trustees must synthesize a great deal of information, sometimes regarding complex issues (Davis, 2005; Myran, Baker, Simone, & Zeiss, 2003). Adults act in a more self-directed manner regarding their learning than do adolescents or children (Amstutz, 1999). Knowles (1984) wrote that as people age, their focus on learning shifts to current applications of knowledge. He continued that adult learning is task- or problem-centered. Further, Kolb (1986) supported the idea that adults learn experientially. These aspects of adult-learning theory are directly related to the characteristics of trustees, as adults, and to their roles in performing the duties of trusteeship. Trustees’ responses in the current study to the variable identifying what one knows, and what one still needs to learn, suggests that trustees are aware of their learning experiences and needs. This finding supports the adult-learning theory concepts of adults
being self-directed in their learning, and taking an active role in addressing gaps in their knowledge.

**Interesting findings.** As a component of the survey instrument, five open-ended questions were asked of the trustees. Response rates to these questions and themes were presented in Chapter Four. The collective responses indicated that trustees receive a great deal of information from state associations, the CEO, and the board chairperson. Trustees indicated they would like more information on their role(s) as a trustee, and on finance. They wrote that they would like the board to stop micromanaging. These responses could serve as a valuable springboard for future research.

**Summary of research questions and blocks.** The five blocks of predictor variables accounted for an adjusted $R^2=.14$ or 14% of the variance in the criterion variable, board use of best practices. Four significant variables had a positive influence on board use of best practices: *the learning needs of trustees’ communities, how many times trustees communicate with the college CEO each week, trustees identifying what they know and what they still need to learn,* and *trustees’ life experiences have prepared them to serve.* Implications for theory and practice are discussed in the following sections.

Unexpectedly, two predictor variables had a negative influence on the criterion variable: *attending workshops provided by trustee associations,* and *being elected by the public.* These findings create ample potential for follow-up in future research.

**Implications for Theory and Practice**

A common goal for many researchers is to contribute information toward a better understanding of a theory or to offer suggestions to improve a practice. That is true of the current study. This research filled a gap in the knowledge and understanding of
community college trustee-training programs and their influence on board use of best practices. Past research had not considered the impact of either involvement theory or adult-learning theory on how trustees learn, and how trustees lead their institutions using best practices.

Implications for theory. The results of using adult learning theory and involvement theory as foundational elements for the current study were mixed. Data analysis more directly affirmed the use of adult-learning theory, and contributed to that theory. Findings in the current study supported the use of involvement theory to a lesser extent.

Two of the six significant predictor variables were rooted in adult learning theory. Results indicated that I am able to identify what I know and what I still need to learn, and my life experiences have prepared me to serve as a trustee were positively related to board use of best practices. Both of these concepts are integrated into adult-learning theory, and describe how adults shape their own learning.

First, trustees’ responses indicated the variable I am able to identify what I know and what I still need to learn positively influenced board use of best practices. Several researchers have written about the self-directed learning aspects of adult-learning theory (Brookfield, 1986; Knowles, 1983; Mezirow 1991; Thompson, 2009). Context-based learning, described by Hansman (2001), suggests that adults seek out learning relative to their particular situations or needs. This would occur as trustees seek information throughout their initial orientation and ongoing training. The current findings offer support for these adult-learning theory perspectives.

Second, the variable my life experiences have prepared me to serve as a trustee had a positive influence on board use of best practices. Integrating people’s life experiences
into their learning schemes is a strong element of adult-learning theory (Knowles, 1984; Roulston, 2010). The current research supports the previous finding that recognizing one’s life experience is an important part of learning, in this case via orientation and training activities relative to board use of best practices.

Relative to community college trustees, an applied use of adult-learning theory in the future would be to generate opportunities for trustees to more formally reflect on what they know and what they perceive their knowledge gaps to be. Creating opportunities for trustees to more purposefully identify and leverage their life experiences could help them focus their talents toward implementing best practices. Correspondingly, identifying gaps in knowledge could be equally useful. Another applied use of adult-learning theory would be for trustees to more specifically identify what aspects of their life experiences have prepared them to serve. In doing so, boards could develop training programs to mimic the learning or knowledge of key life experiences. This could assist trustees who do not already possess these life experiences. To increase the knowledge level of boards as a whole, policy makers might consider selecting trustees who already possess key life experiences.

The results of using involvement theory in the current study were mixed. One measure of trustee involvement was upheld by a significant variable: how many times trustees communicate with the college CEO each week. Boggs (2011) found that college CEOs cited maintaining a positive relationship with trustees was among their most important tasks. In fact, several researchers and experts have cited the importance of the trustee–CEO relationship in information sharing, engagement, and leadership (Coleman, 1981; Perkins, 2012; Vaughan & Weisman, 1997b; White, 2011). The finding in the
current study indicates trustee-CEO communication is a positive influence on board use of best practices, which supports the literature on the importance of the trustee-CEO relationship.

Astin found that students’ involvement with faculty members was important in their success (1993b). As described in that relationship, students sought out their faculty members to gain more information or to gain varying perspectives on a topic, which might help them learn. Involvement among trustees and CEOs is important to the success of an institution. Trustees in this study reported frequent interaction with their CEO. Anecdotal reports would suggest that both parties initiate communication among trustees and CEOs, depending on the issues or situations. The frequency of interaction among trustees and CEOs is an indicator of involvement in this professional setting.

Regarding use of best practices, researchers have highlighted the importance of trustee orientation and training (Boggs & Smith, 1997; Burns, 1966; Davis, 1997; Selingo, 2007; Vaughan & Weisman, 1997a). If researchers, associations, and experts have identified the importance of trustee training; and if they have highlighted the critical relationship among trustees and the CEO; and if Astin has found a level of involvement between individuals to be beneficial; then the results of this study are aligned with and supportive of existing research.

An important implication exists for developing the trustee–CEO relationship further. Colleges could examine how to create more opportunities for trustees to spend time with the college CEO throughout initial and ongoing training periods. This solution, linked to involvement theory, might be helpful in the future. During times of enhanced interaction, trustees could address issues and concerns with the CEO, such as role ambiguity or
finances. Trustees mentioned both in the open-response section of this study. Having a clear understanding of their roles and responsibilities, as well as an effective personal relationship are important (White, 2011). Understanding these aspects permits trustees to perform their fiduciary responsibilities better.

A different involvement variable in the current study: attending workshops offered by trustee associations, was found to have a negative influence on board use of best practice. Astin (1993b) found that one’s involvement with peers had the strongest positive influence on growth and development. It was anticipated that attending workshops would have had a positive influence on board use of best practices, as doing so is clearly an investment of physical and psychological energy with peers. Looking more closely at involvement theory, Astin has provided a clue that might be relevant in this instance. In his writings on talent development, Astin suggested that educators, “focus less on what they do, and more on what the student does: how motivated the student is, how much time and energy the student devotes to the learning process” (1985, p. 142). While this study asked trustees if they attend workshops provided by associations, it did not inquire about levels of motivation or how much energy they devoted to the process. Although it would not have been feasible in the current design to probe that level of detail with each learning strategy, future researchers may want to pursue that aspect.

**Implications for the conceptual framework.** The conceptual framework for this study was Astin’s I-E-O model. This design worked well in the current study, in that it mapped out the process to categorize and analyze the 67-predictor variables into blocks of related variables. The researcher used existing literature to guide the framing of
variables into the five blocks. The blocked form of stepwise regression then allowed for an analysis of the related variables.

**Implications for practice.** This study contributed to the understanding of how trustee orientation and training might be related to board use of best practices. From a professional practice perspective, understanding best practices is most useful in developing improved trustee orientation and training programs. Trustee organizations could pursue activities that leverage self-directed learning practices, which increase self-awareness, as suggested by adult-learning theory. These activities might include time spent journaling or encouraging self-reflection, and developing personalized-learning plans. Associations could leverage involvement activities to make the best use of trustees’ limited time. Associations could identify key persons with whom spending time would benefit trustees, and shape activities to achieve the greatest return. This would almost certainly involve the college CEO, which is consistent with the results trustees reported. In a parallel fashion, previous research revealed that use of best practices, trustee orientation, and trustee-training activities were concerns for leadership in the health-care industry (Holland, Ritvo, & Kovner, 1998). Results of the current study could be used across sectors, could serve as a basis for collaboration in the future, and could be used for sharing promising training methods.

Dika and Janosik (2003) reported only 33% of states have an orientation and training program, and only Texas requires attendance at its program. However, there was widespread support for offering trustee-training programs. Davis (1997) highlighted the importance of providing both solid content that takes into account the attributes of the trustees, as well as effective delivery methods that are respectful of trustees’ busy
schedules. He suggested an effective trustee-education program would contain elements to help them learn the culture of the board, the context of the college, would be driven by the board itself, assist new trustees with effective group processes, bolster analytical decision making, gain better insight into key college stakeholders, and focus on strategic thinking for the future.

Professional associations such as the AACC, the ACCT, and state-trustee organizations all offer training sessions or informational content for new trustees. Given the findings of this study, it might be appropriate for trustee organizations to begin a dialogue with trustees to determine if the format or content of existing workshops is optimal. For example, Astin found that the instructional technique of lecture was negatively related to active learning (1993b). However, workshops are oftentimes conducted using a lecture format. Admittedly, this research did not directly address active learning. It could be relevant in regards to the involvement of trustees in workshops, and their subsequent use of information. Regardless, there is ample opportunity for future researchers to better understand this relationship and its opportunities.

As highlighted in the previous section on implications for theory, ample opportunity exists in trustee-training programs to use adult-learning theory to better understand their knowledge and their knowledge gaps. Likewise, trustee-training programs could benefit from incorporating trustees’ life experiences that prepare them to serve. Crafting structured involvement with the CEO could help trustees better understand their roles, align values and goals, and result in increased use of best practices.
Limitations of the Dissertation

Despite the positive contributions of this study, several factors must be identified as potential limitations. First, the sample size, n=253, was modest. This is the largest limitation of this study. Although sufficient to perform a blocked form of multiple regression analysis, more robust statistical analyses might have been achieved with a larger sample of trustees. The study was limited by the relative uniqueness of the population and sample. The participants were obtained from a sample of convenience, albeit necessary to solicit trustee responses. Community college trustees are infrequently surveyed in this fashion, and mechanisms that would have facilitated this communication are lacking. The study was limited by the inconsistent communication systems practiced by the various states. Not knowing which trustees did or did not receive the survey, not knowing the exact number of trustees currently in office, not knowing how the college presidents responded to this research solicitation, and not knowing why association directors and college presidents did or did not positively respond to this study, are limiting factors.

It might be helpful to adjust the survey design in future research. Adding additional data elements would be helpful. Perhaps using more Likert-type scales would be useful, rather than yes/no responses or open-ended responses.

As this study was the first to introduce both involvement theory and adult learning theory, it remains unknown how trustees embrace these concepts. Nevertheless, the participants in the current study were similar in terms of selection method, occupation, and highest level of education achieved. It is only speculation that the sample and the
nationwide population might be congruent. Caution must be used in applying these results to smaller institutions, as the sample was overrepresented by large institutions.

The study was limited by including only public community college trustees in 16 states. The findings are not applicable to community colleges outside those states or to trustees of other types of higher education institutions, such as universities and baccalaureate- or masters-degree granting colleges. The research was limited by the perspectives of the respondents, and by their life and professional experiences. Similarly, the research was limited by the perceived value of training held by the respondents. Any differences in the beliefs or practices of trustees who responded versus those who did not respond remain a question.

This study assumes participants completed the survey instrument in a candid and honest manner that accurately reflects their beliefs. This study assumed that the community college trustees were interested in sharing their recollections of orientation and training so that the practice could be examined and improved in the future. It further assumed that community college trustees, as stewards of the public trust, were concerned with the effectiveness of college operations and practices.

The current study did not ask if boards included student trustees, and if so, were any of the respondents students. The current study did not include a direct measure of trustee satisfaction with either their service on the board or with the board as a whole. Understanding trustees’ satisfaction could be helpful to better understand their communication with other persons, or their openness to invest time and energy into ongoing training.
Recommendations for Future Research

This survey introduced opportunities to ask further research questions, and to address these questions with both qualitative and quantitative research.

Qualitative approach to understand context. The current study used an empirically-based, quantitative research methodology that employed a web-based survey. Although this was effective in achieving responses from trustees in 16 states, it left several gaps that could be addressed in future research. It would be helpful to actually talk with trustees to better understand their complex roles, and the environment of leading a community college. The current study and analysis did not allow for trustees to expand on the context of their college, or the present situation of community colleges as a whole. The quantitative approach did not allow trustees to express how they feel about being a trustee, or how the interpersonal relationships among trustees develop. Having conversations with trustees would allow researchers to gain insights into the changes experienced by trustees. Researchers could probe for trustees’ level of commitment to orientation and training. A deeper understanding of trustees might lead to innovative ideas that could assist other trustees and college leaders.

Qualitative research could offer insights that would balance this quantitative effort. More than 100 participants of the current study wrote responses to open-ended questions. These responses are summarized in Appendix H. As a next step, it would be helpful to understand what the current participants expressed in their responses, and why they might have done so. Contained within these open-ended responses are at least four themes that would appear to warrant additional investigation. All lead to further questions. First, trustees indicated they receive most of their information from the state or state
association representatives, the CEO, or the board chairperson. Researchers could explore what educational and leadership philosophies these various persons hold, and determine if these key stakeholders are in sync with each other on critical issues, or if they hold disparate viewpoints or approaches. Second, trustees indicated they wanted more information on their roles as a trustee, and on finance. Specifically, what information might trustees find useful? How could associations or professional staff provide this information? Third, trustees indicated they wished for their board to stop micromanaging. What does this mean? How are boards micromanaging? How do CEOs respond? How does all this affect the college? What are the context-specific factors that influenced their responses and thoughts? Based on trustee responses to open-ended questions in this study in which they cite micro-managing as an issue, this study may have uncovered a trend among community college trustees. These responses are consistent with issues of governance relative to a board’s role in providing for governance versus directly governing. The responses may be indicative of Policy Governance® precepts. This could be explored in future studies. Fourth, eight trustees shared with the researcher their ideas on what the board needs to do. As I am a total stranger, I wonder if and how trustees share their ideas with their own board? Do trustees feel they have a voice in their own board or in the work of the college? Are trustees satisfied with their participation or with the organization itself? Future studies could investigate the degree to which new trustees feel they have a voice in board decisions, and to what extent they feel their contributions are valued. These questions could be addressed with qualitative methodologies.
This research asked trustees what learning strategies they used relative to training strategies. For example, in the question “attended workshops offered by trustee associations,” trustees were not able to elaborate on the other benefits or features of attending workshops or given an opportunity to describe why else they might attend a workshop. How might these events provide a social or cultural outlet? Do community college-related workshops offer transferable skills that can be used in their occupations or vice versa, and if so, how? Is there a difference in the mindset of trustees between attending a state association conference or workshop compared to attending a national one? The results of this study suggest associations and professionals have an opportunity to invite trustees to contribute to the content and delivery of conference sessions and materials. Many trustees have robust professional experiences that could be shared with fellow trustees. Some might welcome opportunities to facilitate sessions. A qualitative research approach might allow these questions and connections to be explored.

To provide more nuanced insight into trustee orientation and training, qualitative research could be used to gain a rich understanding of what trustees are thinking, feeling, and doing to serve their colleges better. Qualitative research could also answer questions about how trustees’ thinking and feelings have changed over time, and how they have responded to dynamic contexts. This might lead to a clearer understanding of how best practices evolve and are used by boards of trustees. Although it was beyond the scope of the current study, future research could investigate these factors and what implications this might have on current or future operations and use of best practices.
Future qualitative research could study the leaders of the state associations of community college trustees and their respective college presidents. Both groups were instrumental in achieving the current results. But it is not known why some responded, while others did not. In-depth follow-up with a group of leaders would advance this understanding. Learning about their backgrounds, perceptions, and frames of reference might help better understand the community college trustee initiatives within the various states. A qualitative approach would allow community college researchers to develop narratives that could prove helpful in future orientation and training efforts.

Quantitative follow-up. At the beginning of the current study, the researcher approached a national community college trustee association to inquire about access to their members. Understandably that request was not feasible at the time. However, the current study demonstrated there is an interest in this topic – as evidenced by the participation of 253 trustees from 16 states. The initial goal of this study was to have reached a 40% participation rate. Using the response rate by college, this study achieved a rate of 37.7%. A recommendation for future quantitative research would be to partner with a national organization or to collaborate with multiple organizations to launch an integrated, nationwide study of how trustee orientation, training, and learning relate to best practices. This would likely increase participation rates of both individual trustees and of colleges. A mixed-methods approach could be used, including surveys, interviews, and sessions at national or regional conferences. Collaborating might further open a dialogue to hone best practices.

The current research provided the foundation for additional models. In the current study, a compilation of best practices was used as the criterion variable. In applications
at specific colleges, however, it might be more beneficial to examine individual best practice elements. To that end, future research could address each best practice strand independently. Such a strategy would permit researchers to identify the significant predictors of each best practice, allowing for an à la carte approach to improving trustee orientation and training. This customized approach might be more attractive to trustees, and in line with an adult-learning theory perspective of applied learning.

The current research was a cross-sectional design, meaning it only revealed a snapshot in time. Future research might be well advised to attempt a longitudinal design in which trustee learning and use of best practices could be tracked over years. This methodology could help explain how and why trustees’ responses change over time, as both their experiences evolve, and as the landscape of higher education changes. Future research could investigate how the impact of professional organizations affects individual trustees and the boards on which they serve.

Conclusions

This study added valuable information to the understanding of how community college trustee orientation and training influence board use of best practices. It contributed four factors that are positively related to board use of best practices. This was the first study to use a theory-based approach in the investigation of trustee training and its influence on use of best practices. Previous studies of, and recommendations for, use of best practices suggested a list of to-do items. However, the recommendations for best practice were derived from an applied point of view. This study introduced adult-learning theory and Astin’s involvement theory as viable constructs through which trustee orientation and training could be examined. From a professional practice
standpoint, the results suggested activities that are both grounded in these theories, and that are related to best practices. The results suggested areas of investigation that researchers could pursue to better understand use of best practices, and that practitioners could implement to improve trustee-training experiences.

In the process of determining what factors influence board use of best practices, several intriguing phenomena and opportunities surfaced. First, it is the opinion of this researcher that when addressing community colleges as a whole, any type of consistent organizational structure and communication scheme are lacking. The nation’s community college system is a patchwork or a confederation, at best. This was evident in the different ways community college systems are structured at the state level, the ways in which trustees are selected, and the ways in which state association leaders communicate or do not communicate with their trustees. The literature had already demonstrated that community colleges, as a whole, lack a consistent format of trustee training. But, the lack of a consistent organizational foundation and communication scheme might contribute to the complexity of the challenges faced by organizations such as the American Association of Community Colleges or the Association of Community College Trustees. It might further contribute to difficulty in launching community college segment-related initiatives.

Second, knowing more about why trustees serve and how they interact with the CEO would help explain trustees’ expectations and engagement. Trustees indicated they currently serve on or have served on 3.2 other boards, on average; and they feel their life experiences have prepared them to serve as trustees. Adult learning theory would suggest that trustees bring knowledge and experience with them into their role. If researchers
better understood their motives for service, then we could more thoroughly explain why trustees act in certain manners, and predict how institutions can be of assistance in their growth and development. Given the findings of this study, it might be pertinent to further examine how CEOs could be better informed and prepared to interact with their boards. From an adult learning perspective, both have the potential to offer information and expertise to the other.

Third, there appears to be a real opportunity for community colleges and community college-focused organizations to explore creating a nationally-vetted and commonly-accepted training program for trustees. Community colleges provide a hodgepodge of training opportunities. Although professional organizations offer training recommendations, and some offer training services, there is no standard for trustee orientation and training.

Fourth, community colleges need to proactively prepare for the future possibility of trustee-training mandates. Given the emphases on accountability and performance from funding sources, the federal government, and accrediting agencies, it would not be surprising or unprecedented if any one of these entities would require some degree of trustee training. A similar trend was discovered in the health-care sector across multiple states, relative to hospital boards of trustees. It is not entirely unthinkable to have community college funding or accreditation tied more directly to student success, and tied back to trustee training. Likewise, it is foreseeable that outcries from the general public regarding student success would compel colleges to demonstrate the ways in which they are attempting to be efficient and effective. Trustees most commonly impact student success by setting strategic direction and governance, exhibiting fiduciary
accountability, and maintaining effective relationships with the CEO. To that end, community college trustees would be well advised to thoroughly know what is expected of them from external entities. This could be solidified through training activities. Community colleges have a window of opportunity now to provide input and guidance into any potential future mandates. The community college segment could offer insight into realistic accountability measures, best practices, training content, and delivery methods. Then they could implement those insights into trustee orientation and training.

Fifth, the results of this study would lend itself to increased involvement of colleges’ business and industry, and education communities. A bigger picture goal might be to create more structured systems of learning within communities. One significant finding, understanding the learning needs of trustees’ communities, emphasizes this opportunity. Business and industry members regularly provide feedback to individual colleges and to national organizations, such as AACC. From business and industry representatives’ input, community college could more concisely convey the expectations of these employers. Another sector within communities is that of primary and secondary education, K-12. School board members are not entirely unlike community college board members in terms of responsibilities, selection, and goals. They are both volunteers within a community trying to provide for education of that community. Community college trustees have an opportunity to begin the process of aligning their educational outcome goals with those of school boards, or to continue efforts already underway. Again, interaction with and input from K-12 school boards could be used in developing a more robust understanding of trustees’ communities, and would help trustees develop more meaningful training programs. Combined, K-12 school boards, business and
industry representatives, and community college trustees could be a powerful force to more thoroughly understand the learning needs of communities. That understanding could then be integrated into trustee-training programs, and shared with other stakeholders.

Finally, although community college researchers and practitioners might expect trustees to first and foremost keep an eye to the goals and direction of their institutions, trustees in this survey indicated a higher frequency of dealing with CEO-related issues. In fact, trustees ranked reviewing the long-range priorities of the college last in a list of board practices. Existing research covered in Chapter Two highlighted several studies in which the importance of long-range planning was emphasized (Boggs, 2011; Lovett, 2010; Vaughan & Weisman, 1997b). Nonetheless, the relationship with the CEO was ranked higher in this study of orientation and training. The interplay between trustees’ motivation for service and their relationship with the CEO might warrant further attention. To understand what types of training trustees are truly seeking, it would be helpful to know why they are serving, what they expect from their CEO, and what issues are delegated or assigned to whom. Simply stated, much of the success of trustees might be summarized by their relationship with and the serviced rendered by the CEO. Given the numerous forces that might come to bear on community colleges in the future, trustees would be well advised to thoroughly understand and be well equipped to work with their CEO.

**Contributions to the Literature**

The design of this study was unconventional in examining the orientation, training, and board use of best practices among community college trustees. The findings of this
study go beyond the existing literature, and contribute to a better understanding of community college trustees. It was the first study to use a theory-based approach in examining trustee training by using both adult-learning theory and involvement theory. Previous studies had not used a theoretical foundation in examining trustee training, but rather used practitioner-focused perspectives and recommendations. In using adult-learning theory, this study expanded the use of that paradigm to a new population, community college trustees. Research already existed on adult learning in general, learning in the workplace, and adults’ awareness of and active participation in their learning. However, previous research had not addressed community college trustees’ orientation and training using an adult-learning theory lens. This study also expanded the use of involvement theory to a population of community college trustees. Previous research had established the use of involvement theory beyond the initial population of undergraduates to examine the influence of involvement on the outcomes of graduate students, college faculty members, and college presidents. This study continued that trend in expanding the use of involvement theory to a new segment of higher education stakeholders – trustees. The results of the current study suggested that further research using this theory and population would be helpful.

The current study offered insight into the impact that trustees’ connections to their local communities have on their orientation and training, and how that is related to their subsequent use of best practices. Community college trustees have strong ties to their local communities. Trustees typically live directly in their communities. Their friends and neighbors are the very business persons, K-12 educators, and college students with whom and to whom they are providing leadership. All of these stakeholders can help
inform them of community needs. Trustees indicated they learned about the needs of their local communities within orientation and training programs. They further indicated they are involved with multiple community organization boards or have been involved with boards in the past. These other organizations have likely experienced similar contextual factors as the local community college. The strength of trustees’ connection with local communities might be related to this study’s finding that trustees’ attendance at conferences provided by associations was inversely related to their use of best practices. Explained differently, local ties may be more pertinent to trustees than statewide or national issues. These trustees are active in their communities, they are confident about the strengths they bring to their role as trustees, and they feel their experiences have prepared them to serve as a trustee. All of this may be deeply rooted in ties to local communities.

The current study successfully accomplished the formidable task of contacting trustees. Historically, trustees have been a shielded population. Previous studies of community college trustee practices had typically been conducted using single institutions or small groups of institutions. Oftentimes, these studies were conducted by national associations, and used for descriptive purposes. This study examined trustees from 146 institutions within 16 states. The use of adult-learning theory and involvement theory across a widespread sample allowed for inferential decision-making. Contacting trustees directly, using theory, and obtaining a broad sample addressed gaps in the literature regarding the effectiveness of various elements of trustee training.

The current study conceptualized a new dependent variable, based on existing literature. This new variable was a scale score of community college board use of best
practices. This scale score was used as the criterion variable. Previous research had not attempted to create a single measure of community college board use of best practices. Future researchers can use this new scale as a measure of the effectiveness of community college trustee orientation and training, as related to use of best practices. The scale can also be used as a starting point for a longitudinal process of refining the measure of trustee use of best practices. As a part of that conversation, researchers and practitioners can use the scale to revitalize an effort to identify what recommended practices are truly best practices.

The current study used Astin’s input-environment-outcome methodology, which had not been used previously in a study of community college board use of best practices. The use of I-E-O methodology allowed for a blocking design in which variables were conceptualized and clustered. The subsequent results of this study are empirically-based, and provide data that contribute to the gaps in the literature. In reviewing existing literature, the current research took into account parallel concerns and examples from a different sector of a service industry, healthcare. Existing studies had not identified such connections across sectors. This comparison can serve as a beginning point to tie together similarities in orientation and training among trustees who voluntarily serve in leadership positions of non-profit organizations. If and when commonalities are identified, researchers and practitioners can create effective adult-learning-focused and involvement-based training solutions that impact best practices, and that transcend any one particular industry.

This study offers a new approach in reaching out to community college trustees, namely working through state-based community college trustee associations. This study
successfully worked with 19-trustee associations. Previous research utilizing these localized trustee associations was not available. Future researchers may want to consider using this approach, as it appeared to be positively received. This study collected data via an electronic survey. Previous research tended to use paper-and-pencil formats. By using a web-based survey, this research confirmed trustees’ willingness to use that technology, which addressed uncertainly about whether trustees would embrace technology. Future researchers may want to use this format rather than paper-and-pencil formats. The current survey methodology collected more than 100 open-ended responses, which provided trustees an outlet to express their suggestions and unique perspectives. Although not included in the current data analysis, these open-ended responses provide a base for future exploration. The responses suggest themes that could be researched, and then developed into further training strands. They also provide insight into the thinking of trustees that could be explored in future research projects.

Overall, this study provides several contributions to the existing literature by helping to fill gaps in the understanding of community college trustee orientation, training, and board use of best practices. The results raise intriguing questions that can be addressed in future research, and provide knowledge that can be used by practitioners. The combination of all these things contributes to the existing literature, and establishes fresh material for future practices and research.
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Appendix A

Survey Instrument
Trustee Training and Best Practices Survey
All responses will be kept confidential.

This survey is for community college trustees. The purpose of this research is to gather information to better understand how community college trustee training activities influence boards’ use of best practices. Your responses will only be reported through statistical summaries. You or your college will never be identified. Two likely uses of the resulting information will be to better understand what training activities are most relevant for boards, and to help improve training activities for trustees. Please complete the questions to the best of your knowledge.

<table>
<thead>
<tr>
<th>1. Does your college offer a trustee training program? (Check the box)</th>
<th>7. During training activities, what learning strategies did you use? (Check all that apply)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Read printed materials</td>
</tr>
<tr>
<td>No</td>
<td>Participated in classroom-style sessions</td>
</tr>
<tr>
<td>2. If so, is it required?</td>
<td>Reviewed audio or video tapes</td>
</tr>
<tr>
<td>Yes</td>
<td>Reviewed online materials</td>
</tr>
<tr>
<td>No</td>
<td>Talked with other current trustees</td>
</tr>
<tr>
<td>3. If so, what topics are covered? (Check all that apply)</td>
<td>Talked with past trustees</td>
</tr>
<tr>
<td>College history and traditions</td>
<td>Talked with the CEO or other college employees</td>
</tr>
<tr>
<td>College programs and services</td>
<td>Talked with state or system employees</td>
</tr>
<tr>
<td>College organizational structure</td>
<td>Attended workshops provided by the state</td>
</tr>
<tr>
<td>College finances and budgeting process</td>
<td>Attended workshops provided by trustee associations</td>
</tr>
<tr>
<td>Roles as an individual trustee</td>
<td>Other:</td>
</tr>
<tr>
<td>Roles of the board as a whole</td>
<td></td>
</tr>
<tr>
<td>Culture of the board</td>
<td></td>
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<tr>
<td>Board meetings and board operations</td>
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<tr>
<td>Business and industry needs</td>
<td></td>
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<tr>
<td>Higher education compared to other sectors</td>
<td></td>
</tr>
<tr>
<td>External trends and issues</td>
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<tr>
<td>State or federal policies on higher education</td>
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<tr>
<td>Advocacy</td>
<td></td>
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<tr>
<td>Fundraising</td>
<td></td>
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<tr>
<td>Human relation skills</td>
<td></td>
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<tr>
<td>Learning needs of your community</td>
<td></td>
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<tr>
<td>Other:</td>
<td></td>
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</table>

4. Does your board have a written training guide? □ Yes □ No

5. Does your board have a trustee mentoring program? □ Yes □ No

6. What would you have liked to learn in training that was absent?

8. As a new trustee how many hours did you spend on initial orientation activities? (Print number of hours in box)

9. After your initial orientation, how many hours per month on average do you spend on training activities?

10. How many times do you communicate with other board members each week?

11. How many times do you communicate with the CEO each week?

12. How were you selected as a community college trustee? (Select one)

□ Appointed by governor
□ Appointed by state agency or system official
□ Appointed by county or local government official
□ Elected by the public
□ Selected by your college’s board of trustees
□ Other (please explain):  

135
13. To what extent do the following statements describe you?  
(Circle the best response on the scale provided)  
<table>
<thead>
<tr>
<th>Statement</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am able to identify what I know and what I still need to learn.</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>My life experiences have prepared me to serve as a trustee.</td>
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<tr>
<td>I learn about being a trustee by doing it.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>As a trustee, I focus learning on immediate or pressing issues.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>As a trustee, I learn general information about higher education.</td>
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</table>

14. Each question asks how frequently your board does the stated practice.  
(Circle the best response on the scale provided)  

<table>
<thead>
<tr>
<th>Strategic Direction &amp; Governance</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review the long-term priorities for the college?</td>
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<tr>
<td>Rely on the college’s mission, values, and traditions as a guide for decisions?</td>
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<tr>
<td>Use principles of Policy Governance?</td>
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<tr>
<td>Respect the legitimate roles and responsibilities of other stakeholders?</td>
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<tr>
<td>Advocate for community college issues at the local, state or federal level?</td>
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</table>

<table>
<thead>
<tr>
<th>Fiduciary</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
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<tbody>
<tr>
<td>Monitor college finances (income statements, balance sheets, cash flow statements)</td>
<td></td>
<td></td>
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<tr>
<td>Ensure adequate resources?</td>
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</table>

<table>
<thead>
<tr>
<th>CEO</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
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</thead>
<tbody>
<tr>
<td>Appoint the CEO, as required?</td>
<td></td>
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</tr>
<tr>
<td>Set goals and expectations for the CEO?</td>
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<tr>
<td>Evaluate the CEO annually?</td>
<td></td>
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</tbody>
</table>

15. What activities, if any, should your board stop doing?  

16. How many years have you completed as a community college trustee?  

17. On how many other boards have you served or currently serve?  

18. Print the name of your college:  

19. Print college’s city & state:  

20. What is your occupation?  

21. Your highest education attained:  
(Select one)  
- Other  
- High School Diploma/GED  
- Certificate  
- Associate Degree  
- Bachelor’s Degree  
- Masters Degree  
- Doctoral or Professional Degree  
- Post-Doctoral Work  

22. Any other comments you want to share:  

Thank you for your time. Please seal your completed survey in the envelope provided, and drop in the U.S. Mail.
Appendix B

Initial Survey Solicitation Letter
September 19, 2011

Dear Community College Trustee:

My name is Cory Stine, and I am a doctoral student in the Higher Education Administration program at the University of Toledo. Professionally I have worked within community colleges for eleven years, and I currently the director of admissions at Owens Community College in Toledo, Ohio.

I am requesting your help to please assist me with my dissertation research project, entitled *Community College Trustee Orientation and Training Influence on use of Best Practices*. The purposes of this study are to determine if orientation and training are related to boards’ use of best practices, and to gather information to help improve orientation and training. Your input and participation are vital to gain information about the orientation, training, and best practices of community college trustees. I am asking boards of trustees members to complete this survey and return it to me.

Enclosed you will find the following items:
1) University of Toledo Adult Research Subject Informed Consent Form
2) Trustee Orientation, Training, and Best Practices Survey

The survey typically takes less than eight minutes to complete.

If you would like a copy of the results of this research, please contact me at the email address or telephone below.

Please contact me with any questions or comments you might have about this study. I appreciate your help and insight.

Thank you for sharing your time.

Sincerely,

Cory Stine
Graduate student, University of Toledo, Higher Education Administration Program
Director of Admissions, Owens Community College
567-661-7515(o) or 567-868-5285(c)
cory_stine@owens.edu
Appendix C

Follow up Letter
November 1, 2011

Dear Community College Trustee:

This letter is a gentle reminder to please ask for your help with my dissertation research project, entitled Community College Trustee Orientation and Training Influence on use of Best Practices. Your input and participation are vital to gain information about the orientation, training, and best practices of community college trustees. The purposes of this study are to determine if orientation and training are related to boards’ use of best practices, and to gather information to help improve orientation and training. I am asking boards of trustees members to complete this survey and return it to me.

Enclosed you will find the following items:
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Appendix D

Trustee Survey Instrument Variables List
Survey questions comprising each block of the I-E-O data analysis model

Input Block - Personal demographic and background characteristics of trustees

12. How were you selected as a community college trustee?
16. How many years have you completed as a community college trustee?
17. On how many other boards have you served or currently serve?
20. What is your occupation?
21. Your highest education attained?
22. Any other comments you want to share?

Environment Block 1 - Institutional characteristics

18. Print the name of your college:
19. Print college’s city and state:

Environment Block 2 - Content of trustee training programs

1. Does your college offer a trustee training program?
2. If so, is it required?
3. If so, what topics are covered?
3a. College history and traditions
3b. College programs and services
3c. College organizational structure
3d. College finances and budgeting process
3e. Roles as an individual trustee
3f. Roles of the board as a whole
3g. Culture of the board
3h. Board meetings and board operations
3i. Business and industry overview
3j. Higher education as compared to other sectors
3k. External trends and issues
3l. State or federal policies related to higher education
3m. Advocacy
3n. Fundraising
3o. Human relation skills
3p. The learning needs of your community
3q. Other

4. Does your board have a written training guide?

5. Does your board have a trustee mentoring program?

6. What would you have liked to learn in training that was absent?

Environment Block 3 – Time and involvement of trustees in training activities

8. As a new trustee how many hours did you spend on initial orientation activities?

9. After your initial orientation, how many hours per month on average do you spend on training activities?

10. How many times do you communicate with other board members each week?

11. How many times do you communicate with the CEO each week?
7. During training activities, what learning strategies did you use?

7a. Read printed materials

7b. Participated in classroom style sessions

7c. Reviewed online materials

7d. Talked with other current trustees

7e. Talked with past trustees

7f. Talked with the CEO or other college employees

7g. Talked with state or system employees

7h. Attended workshops provided by the state

7i. Attending workshops provided by trustee associations

7j. Other

13. To what extent do the following statements describe you?

13a. I am able to identify what I know and what I still need to learn?

13b. My life experiences have prepared me to serve as a trustee?

13c. I learn about being a trustee by doing it?

13d. As a trustee, I focus learning on immediate or pressing issues?

13e. As a trustee, I learn general information about higher education?

Outcomes Block

14. Each question asks how frequently your board does the stated practice:

14a. Review the long-term priorities for the college?

14b. Rely on the college’s mission, values, and traditions as a guide for decisions?
14c. Use principles of Policy Governance®?

14d. Respect the legitimate roles and responsibilities of other stakeholders?

14e. Advocate for community college issues at the local, state or federal level?

14f. Monitor college finances (income statements, balance sheets, cash flow statements)?

14g. Ensure adequate resources?

14h. Appoint the CEO, as required?

14i. Set goals and expectations for the CEO?

14j. Evaluate the CEO annually?
Appendix E

Trustee Survey Criterion Variable Themes within Outcome Block of I-E-O Model

Listed by Source
14a. Review the long-term priorities for the college?


14c. Use the principles of Policy Governance®?

Chait, Holland, & Taylor (1993)

14b. Rely on the college’s mission, values, and traditions as a guide for decisions?

Coleman (1981)

14g. Ensure adequate resources?

Doyle, 2009

14f. Monitor finances using income statements, balance sheets, and cash flow statements?

Gilbert, F. (1976)

14d. Respect the legitimate roles and responsibilities of other stakeholders?

Holland, Chait, & Taylor (1989)

14g. Ensure adequate resources?

Ingram, 1995

14a. Review the long-term priorities for the college?

14g. Ensure adequate resources?

14h. Appoint the CEO, as required?

14i. Set goals and expectations for the CEO?
14j. Evaluate the CEO annually?

14e. Advocate for community college issues at the local, state or federal level?

Zwingle (1975)

14e. Advocate for community college issues at the local, state or federal level?

14d. Respect the legitimate roles and responsibilities of other stakeholders?
Appendix F

Email Notice to Trustees from Community College Associations
November 1, 2011

Dear Colleague:

This message is to share with you an opportunity to help improve community college trustee training activities. We have been approached by Cory Stine, a graduate student at the University of Toledo and a community college professional, for assistance.

The purposes of this effort are to determine if trustee training is related to boards’ use of best practices, and to gather information to help improve training. Your input is vital.

I ask that you would please help this effort and complete the web-based survey by clicking <<this link>>. The survey typically takes ten minutes to complete.

Sincerely,

John Doe
Director of XYZ Community College Association
Appendix G

National Council of State Directors of Community Colleges
Arizona Community College Association
Arkansas Association of Two Year Colleges
Community College League of California
Florida Association of Community Colleges
Technical College Directors’ Association of Georgia
Illinois Community College Trustee Association
Iowa Association of Community College Trustees
Kansas Association of Community College Trustees
Maryland Association of Community Colleges
Michigan Community College Association
Mississippi Association of Community/Junior Colleges
Missouri Community College Association
Nebraska Community College Association
New Jersey Council of Community Colleges
New Mexico Association of Community Colleges
New York Community College Trustees of the State University of New York, Inc.
North Carolina Association of Community College Trustees
Ohio Association of Community Colleges
Oregon Community College Association
Pennsylvania Commission for Community Colleges
Texas Association of Community Colleges
Trustee Association of Community and Technical Colleges [State of Washington]
Virginia Community College System
Wisconsin Technical College System
Appendix H

Trustee Responses to Open-ended Survey Questions
Does your college offer a trustee training program? If so, what topics are covered?
1. President's Responsibilities.
2. Sustainable development.
3. Most of our training comes through the state trustee association. We do have a manual and other materials for new trustees and an orientation meeting for them.
4. The state Technical and Community College Trustee association offers the training and it is good training and time to meet other trustees throughout our state.
5. Training for new trustees is required at the state level (NC Assoc. of Comm. College Trustees) and, in general, covers the items checked above.
6. Retreats on specific topics needed.
7. All of the above is covered in a handbook to each trustee; with training as the topics arise.
9. Last training was on Interest Based negotiations.
10. Legal aspects of being a cc trustee in CA--Ed Code, open meeting laws and ethics laws.
12. Other topics listed are provided at state-wide training.
13. Current issues affecting our colleges.
14. How to pass a bond measure.
15. Information about the foundation and how it supports and relates to the college.
16. I did have the opportunity to attend a one day training at the Salem, Oregon office with other Community College Board members, I found it very helpful and wish that the other new board member had attended.
17. Board/President relationship.
18. All offered through the Oregon Community College Association.
19. Training program is not a formal program; asked to attend 2 conferences.
20. Roles of the VP's.
21. I do not know how useful this staff provided info is. I do not believe it is adequate.
22. Enrollment, building issues capacity, strategies planning audit results.
23. Touched on all; emphasized others...training session is a few hours' orientation; and there are lots of opportunities passed on to us to attend conferences/workshops to benefit us as Trustees.
24. We use a modified Carver Board Model, which I was given the book to read and we have actual formal Board Policy and Procedures, as compared to my previous Board experience, we had neither.
25. Annual training thru the State Higher Ed Dept.
26. A trustee mentor is assigned to new trustees and a handbook covering most of the above topics is given.
27. Policy Governance.
28. Campus Visits.
29. Don't know what is covered.
What Would You Have Liked to Learn in Training That Was Absent?
1. It would have been helpful to have a mentor.
2. Great idea-need to promote at my community college.
3. More detail on financials and funding.
4. We have an excellent State trustee training program. The college relies heavily upon this resource. It would be very helpful for the college to offer in addition an orientation specifically related to the college.
5. Certification process, other educational opportunities, what other colleges are doing, shared governance.
6. Governance models for the board is always helpful. The importance of Boards to function as a whole.
8. Ongoing issues and plans.
9. We do not have a formal mentoring program, but as board president I saw myself in that role and do mentor the two new board members. We do have to [provide] explanations.
10. A comprehensive program including all the best practices of the items suggested above.
11. I would like to have reviewed by-laws and SOPs.
12. The use of the many abbreviations used at meetings. More training on how to read the financial statements.
13. There was no training when I became a trustee in 1985. When I became chair in 1994, I started an orientation session for new trustees. Each new trustee is also assigned a mentor. All trustees are encouraged to ask questions any time they need additional information. Retreats offer additional opportunities for trustees to learn and grow in their jobs.
14. The legal and group dynamic realities of union negotiations. Trustees should be prepared for the hideous incivilities and ad hominum attacks that accompany difficult decisions in academia.
15. Communication Skills, Civility.
16. Community need, SWOT, more detail on responsibility as elected board is different than traditional non-profits.
17. College administrative structure, budget process.
18. More on Board protocol.
19. "Training" was excellent. Series of roundtable meetings with leaders of different departments to understand the what, who, and how.
20. For California trustees, training on the Brown Act (Open Meeting Guidelines). Have a guided tour of the various campuses/centers so that new trustees can get an idea of the physical plant, etc.
21. Role of trustees in relation to college athletics. How to "police" each other.
22. More info on procedures, campus/program tours by individual deans/chairs instead of general tour, written procedure guideline (a checklist is put out by the state cc league and is pretty good and could be replicated for our campus).
23. We have since improved the Trustee orientation dramatically since I was elected. I would have liked to see needs assessment of our service community and the business and industry.
24. In depth budget analysis, union negotiation practices.
25. Comparative analysis of Public employment and Private employment. The issues and system are vastly different.
27. What the process is for an individual to run for College Board, starting from the area/district the individual represents to filing with the County Clerk's Office etc.
28. Insight into the various college groups, i.e. Academic Senate, Classified and Faculty Unions, etc.
29. Nothing particular b/c the politics changes constantly.
30. Board policies concerning Brown Act.
31. The orientation was thorough, but overwhelming. We have a ten-college district. I have asked for a follow-up orientation after serving for one year.
32. Accreditation Standards; Role of State Agencies, e.g. Chancellor's Office, Board of Governors
33. More about the role of a Board member and more history and context of the District.
34. How to analyze student data.
35. Repeating the training after one year on the board is very valuable because it is easier to put the knowledge in context.
36. Nothing...my orientation was very comprehensive.
37. More about the finances and board policies.
38. Campus politics and protocols.
39. Brown Act, Legal parameters for Board of Trustee operations.
40. M
41. We have an informal mentoring program. Much is learned at our state conference which offers New Trustee training. Much on the Brown Act. Would have appreciated hearing more about college history and board policy and procedures at the time of my orientation.
42. How to read an audit report, How to read a budget and look for areas to ask the right kinds of questions.
43. When I began we had no program so as one of my projects, we developed one that seems to work very well. We also did something for a new president when hired. Below info refers to program in place.
44. All of my concerns and questions were fully answered.
45. ALL OF THE ABOVE.
46. How to raise funds for the campaign.
47. I am still finding out about the various programs the college offers-I have not had an overview, but as they come up in the course of board meetings I ask and learn. I get a lot out of the presentations that have been offered. As I work with this
I look forward to finding out more about the school. I'm very inquisitive so I have learned a lot—but on my own. No specific training per se.

48. All the topics listed in the earlier question.
49. The training has changed since I went through it. I wanted more about the board role and board/president relationship. And I wanted a board member to be involved in giving the orientation. I'm currently chair of the board and have been able to make that change.

50. n/a
51. It was brief. That we follow Small Board Robert's rules, describe the culture and be honest about it...and why.
52. More about the roles of the board, the fine lines about the relationships and communications that we can or should (or should not) develop with the administration and faculty.
53. More details within all areas.
54. Policy Governance, Chancellor/Trustee relationship—dos and don'ts, Framework for policy development, Finances 101—Basic understanding of community college funding, Effective Board: Roles and responsibilities, Board education.
55. Most every thing
56. To stay current with trends, practices and programs as part of the planning process for our college.
57. Where is the "don't know" answer? I truly do not know if we have a written guide. My training was so long ago (I am serving my 13th year) so I don't recall what was missing. I do remember a barrage of arcane financial data which made no sense.
58. How to make changes faster
59. A college-based orientation. Our training was offered by a statewide organization.
60. How to agendize items; the history of how this Board has and has not used Robert's Rules of Order; more info about participatory governance at this district.
61. More in depth insight of programs
62. More about culture, informal politics of college
63. Unknown.
64. The importance of building a Board-President Team, and beyond that, building a positive Faculty-Staff environment.
65. I joined the Board after having spent 25 years as a faculty member. During ten years of that time, I was the faculty representative to the Board, meaning that I attended every Board meeting. I feel that I had sufficient exposure over that period to achieve a firm idea of the Boards activities and actions to need no further orientation or training.
66. The mentoring program is in name only. I received no assistance as a new board member and though I offered help to a new member, I had no plan of action or specific information to offer. He of course, declined help.
67. More about the college policies, foundation and hiring practices.
68. Our board operates under the Carver Policy Governance and when I came on the board 6 years ago I was given a copy of the policy governance. That was my orientation but we have since started having an orientation for new members plus we review portions of the governance at each board meeting.
69. Written training guide.
70. Maybe just what a Trustee should know about the college and how we should operate under Policy Governance.
71. An assigned mentor is a great idea.
72. I think if would have been helpful.
73. Robert's Rules for the meetings themselves and how to run a meeting as the board chair.
74. Funding system.
75. More detail on finance & budget.
76. More financial info.
77. Wish the training would have lasted longer so I could better assimilate the material.
78. Perhaps my expectations are different, but I think there's no training program that could cover everything, and that much of the learning curve lies in Trustee and committee meetings . . .
79. We reviewed documents, discussed various handouts regarding Carver model, organization, financials, including project plans. Would have like to had more information on roles and responsibilities, expectations and human relation skills.
80. The President of our college met with each trustee for lunch and a minimum 2-3 hr. meeting with him and his assistant to acquaint us with the role. Also, we received a binder for new trustees covering various information.
81. Our District encourages trustees to take advantage of the state community college league training. It is a comprehensive program. Until I was able to take that training, I was rather on my own.
82. More about the role of a board member.
83. Role of Trustees in raising personnel management issues, standards of performance for Deans, opportunity for strategic planning with Trustees and Senior College Staff.
84. It is collegial and is OK. Could be better.
85. Our college doesn't offer training but the KACCT does have training that I participated in as I came on the board. I do believe a bit more understanding of the board policy would have been helpful on the college training.
86. We conduct an annual Retreat in which current topics are presented and discussed.
87. Training was sufficient.
88. Proper process for raising issues, particularly with held information requested.
89. Initial training was comprehensive. Nothing further required.
90. I felt very prepared after training both in-house and at an ACCT new trustee conference.
91. I can think of nothing at the moment.
92. Advocacy, learning the needs of the community, government policies on community colleges.
93. More about what is expected of a board member.
94. I had very little training from the college, but had experience with other school boards. That was 20 years ago and we try to train our new trustees.
95. When I became a trustee, there was no training. I have learned the system through reading the Code and from attending conferences.

96. More information explaining the differences between how the college accounting work and how business accounting is done.

97. I believe it was covered for me.

98. More about my role in policy writing.

99. I would have liked to come onto the Board with a greater knowledge of finances, both at the College and for governmental funding streams. It takes about two years to become conversant on those topics.

100. It's o.k. to not know everything I need to know to be an effective board member.

101. Finance, advocacy, state relationships, policies, trustee roles, history

102. A little more about finance.

103. When I was appointed in 1999, I was sent to the national conference for new trustees.

During training activities, what learning strategies did you use?

1. Via attendance and follow-up questions

2. We provide training at each board meeting, update on any subject requested by the board members. Each board meeting an area of interested is covered. These are selected by the board president at the beginning of each year.

3. Each new trustee spends 2 2 hr sessions with president and board chair.

4. Presentations by the college staff.

5. Training opportunities provided by the state trustee organization were different than those from the local college

6. Met with representatives of unions, faculty senates, etc.

7. Met with community, faculty, staff, students.

8. The training program was not in place when I came on the Board.

9. Did not have program when I was new to board.

10. Role playing scenarios; parliamentary procedure.

11. Attended workshops attended by the county.

12. Our Chancellor prepared a notebook with all the major departments and programs offered within our district.

13. I attended a conference at the coast and learned a great deal about the other community colleges in Oregon.

14. Basically a one-on-one with VP.

15. Pres. and Board Chair do most of the orientation of new trustees.

16. Attended training provided by Working Partnerships USA.

17. Please note that all boxes I checked were SELF driven, not any official training offered by the district. I am also a faculty member and got much of my training through my faculty union leadership role.

18. Encouraged to participate in state's new trustee conference.

19. I sat down with the Chairman of the Board, the President and CFO of the college and we discussed printed materials and the Carver book on Board Organization was given to me.

20. This was at the KACCT.
21. Orientation was provided but not an official training program.
22. Again - don't know.
23. Orientation only.
24. OJT.
25. Conference training.
26. Attend ACCT workshops for trustees.
27. ACCT.

What activities, if any, should your board stop doing?

1. None that I am aware of.
2. n/a
3. None
4. None
5. I am aware of none.
7. Whenever there is a new member- they are easily influenced by the public - the board needs to be together and work cooperatively.
8. Can't think of any.
9. None
10. I believe in educational retreats and strategic planning. My board resists both. So they should stop resisting.
11. Remove politics from appointments and base appointment to board based upon expertise from the community.
12. I'd like to see a consent agenda.
13. Sitting through long "presentations" by administration and other programs that take up most Board time. It is tolerated by the Board, majority of members still like the presentations but would wish them to be shorter.
14. SOME ARE NOT PREPARED FOR MEETING BY REVIEWING MATERIALS PROVIDED.
15. Too new to be able to respond at this time.
16. The Higher Ed sector places a disproportionate emphasis on employee morale and inclusiveness in decision making. The overarching focus should be student success and responsiveness to the educational needs of external stakeholders. Thus the board should reduce activities, surveys and communications which perpetuate a myopic and misplaced focus on employee satisfaction.
17. Nothing jumps out at me. I know what we should start doing or do better but not "stop" doing.
18. Operational functions like approving staff appointments...
20. Micromanaging, Rubberstamping.
22. Micro managing the C.E.O.
23. None that come to mind.
24. Tendency to micromanage.
25. Take the politics out of the public meetings, refrain from any micro management, and not try to influence as an individual but work as a board.

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26. Disrespect another and self promote individually.
27. None
28. None at this time.
29. None our board is a good board and all respect each other’s opinion.
30. None
31. None applicable.
32. Micro managing.
33. Small-minded activities of controlling information or feeling some have more power than other trustees.
34. None
35. None to identify.
36. Rehashing old business; trying to maintain the status quo.
37. None
38. Keep the line clear between the Boards roles and functions and the CEO/Staff roles.
39. Taking up too much of the president's time. Some members call the president too often about trivia.
40. None
41. Several members of our board have made back-door deals with the CEOs. One Board Member should stop rolling her eyes and sticking out her tongue whenever she does not agree with what another trustee is saying. This same board member needs to read the board book before coming to the board meetings.
42. None. Board is very efficient in its use of time.
43. None
44. The board should and we have stopped ordering expensive meals for events and meetings. Travel expenses have been slashed and only Board representatives are sent to conferences.
45. Can't think of any.
46. We have a good board
47. Spending too much time on areas that are not within our realm of responsibility.
48. Respect one another, Not communicate to one another for board functions out of open meeting.
49. None
50. Receiving staff presentations at meetings that are just 'show and tell' and not related to the decisions that the board is responsible to make.
51. Occasionally some trustees stray into areas that are more properly management decisions
52. We are a very compatible 7 member board.
53. None
54. N/a
55. Just asking questions of Administration - we need to have discussions among ourselves too!
56. Talk too much--some members.
57. None
58. Reducing the length of board meetings (long and tedious).
59. Allowing issues to become personal.
60. Letting personalities get in the way of our work.
61. Board members should cease expressing frustration when other board members ask financial or contractual questions. Our board members should soften the culture that pressures to "support staff" and vote "yes" on all staff recommendations.
62. Need far more communication with CEO.
63. Approving low capital dollars.
64. Can't think of any.
65. n/a
66. Too frequent visits to campus by a board member.
67. One member attempts to bring up disallowed topics during executive sessions on rare occasions. When this occurs, other members point out the errors and the discussion ends. This is not a major problem. Our Board has no major problems that need correcting otherwise.
68. I respect the importance of OACC and ACCT but I advocate that only 2 trustees attend a conference and then report to the full board upon return.
69. NONE
70. Stay out of the means, we are a board of the ends.
71. Managing rather than governing.
72. Our board really gets along well, and I cannot think of anything in this area. We follow policy governance, so we just hire the president and he tells us what we need to know. Sometimes it can be that we are a rubber stamping board, although we have a fine president.
73. None
74. All board members should participate in board training.
75. Rotating the chair every year.
76. Discussing some issues that in executive session that are best discussed in the public session.
77. None Noted.
78. None noted
79. None
80. None
81. Most boards have a lack of follow thru both from the standpoint of actions and accountability during board meetings. Assignments should be made during board meetings if the issue is important for the BOARD, and not the individual. Our board should do more of this.
82. None
83. Some of us get too involved in micro-managing and forget to let the CEO do his job.
84. None. As an elected Board all activities are under the aegis of the Board or delegated to the President.
85. Micromanaging
86. None
87. We are pretty functional actually.
88. Some think in one meeting a month we can work out all the issues but some of those conversations should happen with appropriate people prior to the meeting.
89. None; I think we have things about right.
90. None.
91. Segregating information among selected members.
92. Can't think of any.
93. N/A - we have a well functioning board.
94. Spending time micro-managing.
95. Nothing I can think of.
96. Approving bills, when we really have very little input on what they cover or why the money is being spent.
97. Micro Manage.
98. The Board should question the validity of the actions of the CEO. Are her actions reflecting her words?
99. None. I don't feel that any of our activities are very important.
100. All activities are appropriate.
101. None that I can think of.
102. None.
103. None.
104. Requiring a unanimous board vote to designate Emeritus status for a former trustee. 2/3 vote should be adequate.
105. None that I can think of.
106. Micromanaging, allowing trustees to stay on forever.
107. Reviewing self-explanatory reports that can be read at other times.

Please provide any other comments you want to share.
1. I believe the community college is vital to work force development and training needed here in NC to get our economy moving forward.
2. I currently serve as the Chair of the BOT so therefore am probably more involved than other trustees.
3. Chairman 2 Years, Foundation Director.
4. My position on the college board has been educational and rewarding. The training we receive is through the state meetings and [I] feel that is very beneficial. An orientation training booklet would be quite beneficial I feel for future trustees.
5. We are a very small rural community college in a socially, economically, culturally deprived Tier 1 county. Resources are limited. Most individuals in our community wear multiple hats.
6. It is very challenging for full time employed trustee to invest the kind of time a college deserves from a trustee.
7. We are now in the process of completing a webinar for new trustees in New York State.
8. I was president of the college foundation for many years. I feel I know more about the college than most of the trustees...
9. I attended a one day Orientation sponsored by the state and Community College Boards. It was attended by Trustees, Attorney General's office, Chancellors and Presidents. The orientation gave me a great perspective of my role and governance.
10. Being a trustee has been rewarding and a big commitment of time, energy and resources. It is an excellent way of giving back to our communities and citizens.

11. Transitioning new trustees onto the board is a critical time. Having to do that at the same time as a new president has just been hired can be most difficult.

12. Your research touches on an extremely important subject for trustees. I would appreciate a copy of the results and your study.

13. The appointment is political. It is non-salaried but still requires a large amount of time, travel, and involves state ethics training as well as other legal training, leaving precious little time for trustee training. Few citizens have the time or resources to dedicate to the effort and after my second term is complete, I will not pursue another.

14. Many Board members originally were appointed by other Board members rather than stand for election. It seems to maintain similar view points that Administration "can do no wrong".

15. Your survey focused solely on formal orientation and training of new board members. However, much important training and orientation is conducted informally, particularly if there is receptivity by the new member or members.

16. More workshops needed on the learning curve of seasoned trustees when new elected trustees come on the Board. And how does this survey remain anonymous when you asked for the name of the college and the address???

17. In Michigan we hold an annual meeting-for training/updates on current legislation. 2-3 Board members attend-the ACCT National Congress yearly for other training.

18. Many of the questions posed here related to a "college" whereas much of the training/orientation/etc. we receive is through the statewide community college association.

19. The questions about the frequency our Board does things are hard to answer because of ambiguity. For example, "monitor college finances": does this mean "stay aware of them" (which we do) or "look at financial statements every week" (which isn't our role)? For "ensure adequate resources": we can't control what the state budget provides to us, but we can try to allocate the available funds in the best way possible; so how often are we "providing adequate resources"?

20. n/a

21. Because the Board is a political position it is difficult to take the politics out of the business of the college. Stability is extremely important but we are operating in a time of constant change. Participatory governance is extremely important but difficult at times. Trustee mentorship important but difficult because of the political nature of the position.

22. I agree that some standard method for bringing new trustees up to speed is needed for our board. Our board is very stable and there is currently not much change made at the elections. We work very well as a board...

23. In my district new trustees receive their "training" from the CEO (Chancellor) of the district. It is not a formalized program, it isn't evaluated, and really the education is always ongoing for all trustees. My state League provides annual training for new trustees and board chairs. Our district strongly encourages trustees to attend and pays their way to attend.
24. I have a BS in Nursing and 20yr practice. Forty years Trucking Business. Ten years as County Supervisor. Many years in school, 4-H and Church leadership roles. Our Tech Board is 9 members, 3 business managers, 3 employees, 1 high school principal, and 2 at large.

25. In CA, CCLC does an excellent job training, just budget constraints limit many from utilizing the services. -Best of luck to you.

26. Would like the results of your survey.

27. Some of your questions do not provide the option to give an adequate answer from the choices listed. The Community College League of California provides wonderful written materials, conferences, and resources for trustee education. I am a member of the Advisory Committee for Educational Services that provides leadership for the CCLC events.

28. Serving on this Board has been an enlightening experience!

29. This survey was difficult for me to do because we so infrequently switch board members. The person who was in my place previously served for 20 years! Because of this, there is not much of a "training program" for new members but the college sent me to workshops for trustees and that was positive. Our board frequently attends trustee association workshops for updates on college issues and I count that as "training." Also the college staff provides us with material and sometimes does presentations that also inform and educate us. I think you'll find that colleges don't change their trustees very often so a formal training program is non-existent.

30. Some answers might be different after a full year of service on the board.

31. California provides particular challenges in the communication and fiscal areas at the moment.

32. Our Board has been fairly dysfunctional. We have just elected a new Board President, and I hope our practices will be become more transparent and focused on the needs and opportunities for the students, rather than personal agendas.

33. Our colleges need a more structured orientation for new trustees.

34. CA is suffering from severe budget problems. Health and utility costs are escalating while annual state dollars continue to diminish. The mission is in jeopardy. Structural tax reform is needed.

35. The Community College League of California provides excellent training for new and continuing trustees. The Trustee Handbook is excellent. Our District provides a guide for the Board President.

36. May have been useful to ask more open ended questions on how the training works, the fill in the box didn't seem adequate to describe what we do.

37. We are well grounded in the policy governance model and have found it to work well in differentiating the work of the board from the work of the management team.

38. I am on the board by virtue of being a public official and have served on many commissions/boards i.e.: Planning, Community Development, Finance, Personnel and others.

39. I am very impressed with this board and how they respect each other and are willing to share and help the new directors. I would like to know more about the
college and continue to ask many questions. I feel like I can do my job better with more knowledge and look forward to learning more every time we meet.

40. In the survey I was unclear about what was meant by frequency. My board is about to start training on the Policy Governance model.

41. 27 years ago when I was first elected our District had no trustee orientation. I took advantage of training offered to through the California Community College Trustees organization.

42. I am a retired Parks and Recreation Director from the City of Turlock.

43. We have a strong board, a strong president. We are one of the small to medium sized colleges. We are in the top 5 to 10% in the nation on student success. Few colleges are run as efficiently and with less controversy than SMC.

44. I applaud your effort to gather this data. I have realized that a trustee orientation should be formal, in-depth with room to develop a trustee education plan. Learning about best practices and models can only be known by having a formal board development process and training program.

45. I think Trustees should be term limited. I keep experiencing the cultural jamming of old politics.

46. Good luck in your work.

47. Good luck.

48. Community College Trustees should be familiar with the State Education Code, especially the sections with enabling language that form the foundation to the entire system. Also, trustees properly should be involved with big policy issues such as setting priorities for enrollment and responding to community academic needs.

49. I wish that our college provided more training -- and I have advocated such, but have never been in the majority in feeling that it was needed. (It is!!)

50. The environment and expectations change with any change in CEO, who is the ultimate influence on Board responses.

51. Our six Board members average 13 years tenure in their current positions, including a senior member with 25 years. When new members join the Board, current members undertake the job of mentoring as a group during regular meetings. In the rare event that this is not sufficient, the Board chair may deal with orientation problems by meeting individually with the new member to explain laws, protocol, and tradition.

52. I am so happy to assist you, as I have completed such surveys when I finished my Ed.S. degree work, sending out a survey to all junior high principals in Kansas, I got 90% returns. Yours was a good survey and good luck. I sure want a copy of it.

53. Orientation was more informal but structured via interviews with college president and staff. Florida Sunshine law prohibits closed meetings with other trustees - only open publicly noticed meetings with other trustees permitted.

54. I love the community college! I wish the college where I am a professor were run in the same manner!

55. While my actual time on the board has been short, I am well acquainted with how this college works. The integrity level is at 100%. SFCC has always been a model of the academic world.
56. You will note that I do not talk with other trustees. Under the FL Sunshine Law, we are not allowed to discuss college business with each other outside of a public meeting. We may have personal contact but not discuss any item we may vote on.

57. The questions do not reflect the true nature of a Community College.

58. I'm also President of our State Association, which is Kansas Association of Community College Trustees. I love to do this work!

59. Good luck . . . we hope to see the results of your survey.

60. A pretty good survey. You might want to follow up with a Phase 2 survey based on your output from this one. I was expecting a question like "What do you think is best practice for training trustees at your college" and "What should a best practice(s) look like for all Community Colleges"? I cannot print the survey to capture all my narrative responses...and when I go back to previous page from this page to the first page I LOSE all my comments on this page! Your survey provider should correct this.

61. I graduated from this college. There was no formal training when I became a board member. I spoke to all of the administrators and some of the staff to learn about the college operations. I have been diligent to attend trustee association meetings and state continuing education. I read the Trustee magazine, and all materials provided to us before board meetings.

62. Board Members seem too passive and unprepared for strategic discussions and have limited operational experience to provide meaningful inputs. Many seem unprepared for Board meetings and too readily rubber stamp routine as well as - significant proposals.

63. We have recently hired a new CEO and great changes are being made. I look for many positive changes and more communication and accountability from the new CEO.

64. Good luck.

65. I think if I offered the name and city, it truly wouldn't be anonymous. Pretty easy to see who I am.

66. Although a formal training program is not given, the guidance of the mentor, the written materials (trustee handbook) and the openness and cooperation of college administrators is invaluable.

67. None

68. The Governance models are for the most part not compatible with the Code as developed by the State legislature.

69. I don't think the governance policy is perfect.

70. Our Board has functioned using Policy Governance 12+ years and we follow it not just say we do. Our new trustees receive Policy Governance orientation. We have Pol. Gov. retreats and self-evaluation of our meetings monthly. It has provided us to be effective and efficient. We work as a whole board with one voice speaking for us... usually the Chair or our college PR personnel.

71. I find your survey unsettling because your questions/focus is narrow and a great deal of bd. training happens in ways others than inferred by your questions.

72. I've been a School Board President and Chairman of our local museum board, among other things - RACC is the most rewarding volunteer effort I have ever been engaged in.
73. I have been involved with RACC since the early 1990's; the college has done an outstanding job and continues to get better.
74. #1 concern is the boards need to compensate our president fairly and equal to the performance and deliverables.