

A TRUSTEE'S VIEW OF THE CHIEF BUSINESS OFFICER

Bernie Rhinerson, Former Board President and
Trustee, San Diego Community College District





Agenda

- My Background
 - K-12 vs. Community Colleges
 - Why I ran for office
- The Care and Training of a New Trustee
- Board Presentations
- Trustees and the Audit Process
- Trustees and Policy/Legislation
- Trustees and Bond Programs

My Background

- Public Relations/Political Consultant
- Adjunct Professor of Public Administration at SDSU - 20 years
- Chief of Staff – SD Unified
- SDCCD Board Trustee – 12 years



The Care and Training of a New Trustee

The Critical Role of the CBO



**“I just got elected and I
need you to teach me
everything!”**

- Community College Finance has a language of its own.
- Most Trustees have Zero experience with education finance.
- It will take most trustees a year or more to begin to understand the CC finance process and cycle.
- Simplify, Simplify, Simplify.



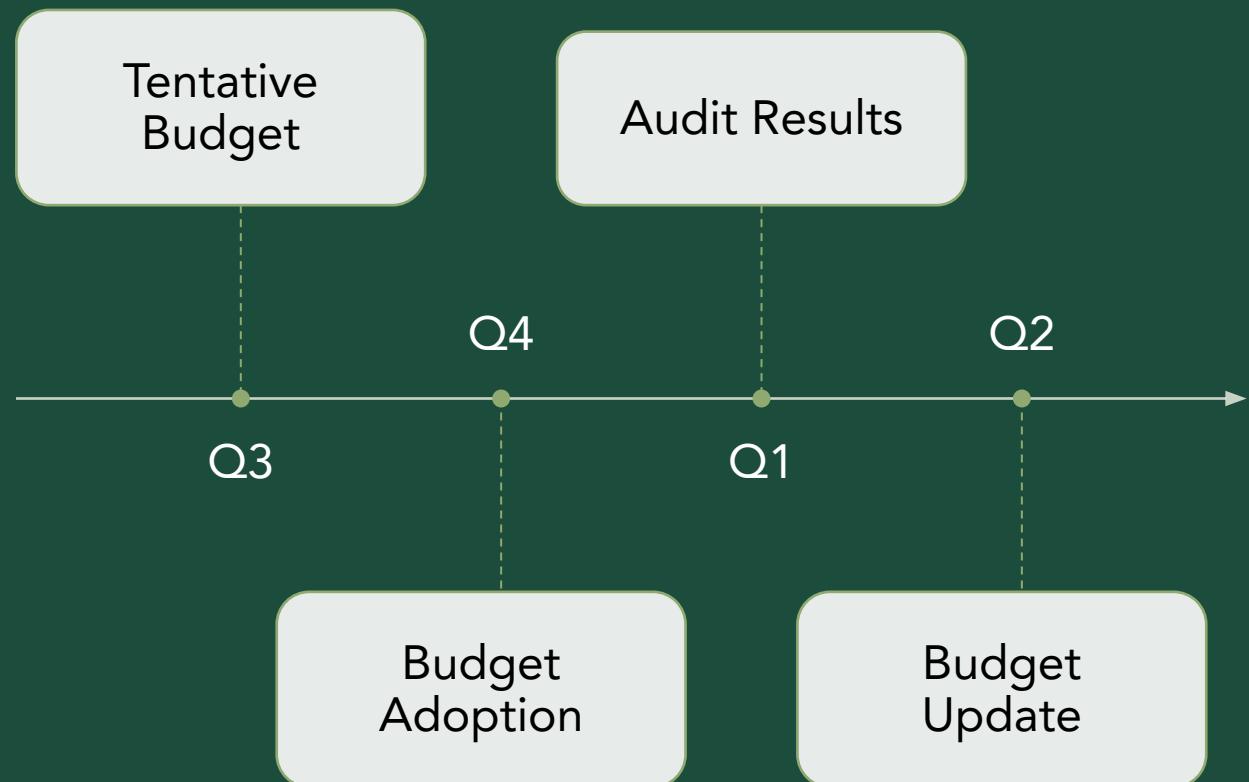


Top 3 Things A New Trustee Needs to Know from the CBO?

You Tell Me... Then I'll Tell You.

Board Presentations

- Teach Trustees the “Cycle” so they know what to expect during a year
- Advance briefings to preempt in meeting questions
- Use simple short language and simple charts and graphs
- Present good news and bad news
 - Build trust
- Problems with solutions and options





The Trustee and the Annual Audit

- Recognize the Audit Results Are A Trustee Fiduciary Responsibility and have political implications
- Budget and Audit Subcommittee
- Explain the process and trustee role
- Share findings with plans to resolve
- Promise and deliver follow-up on findings
- If necessary, have a communication plan ready

Trustees Role with Policy and Legislation



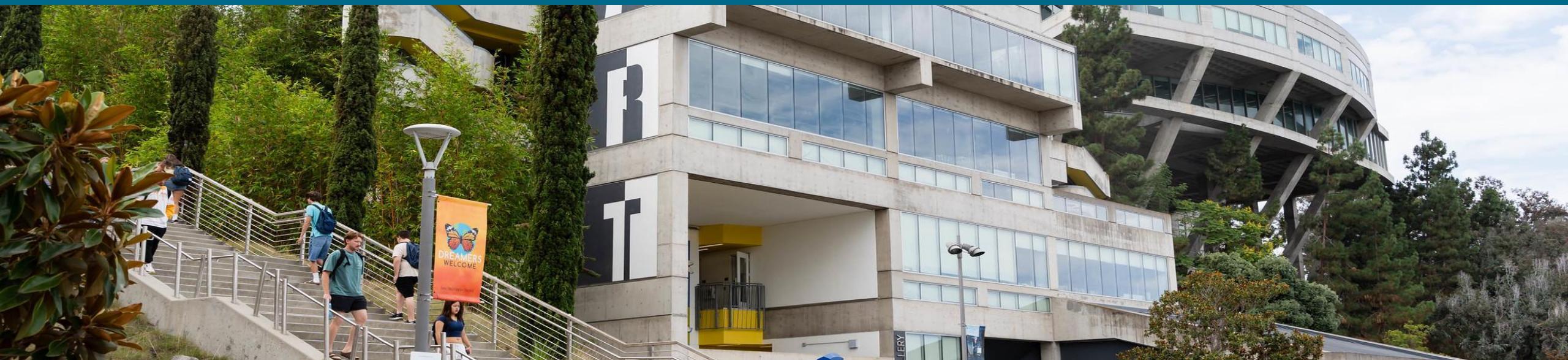
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- Explain Board Policies on Fiscal Matters
 - Reserves
- Create roles, opportunities and activities for Trustees with legislation
- Provide ammunition for advocacy
 - Numbers, facts, impacts



Trustees and Bond Programs

- Why Bond Programs are a Trustee Favorite
- CBO Pre Election Trustee Communications
 - Resolution language, project list, facility needs
- CBO/Trustee Implementation Communications
 - Rainbow Report
 - Change Orders
 - Refinancing/Credit Ratings



Building Trust With Trustees

- The Chancellor/ College President and CBO Team
 - The same team
 - Information Flow
- Communicate Early, Often and Consistent
- KISS - Keep it Simple
- Good News and Bad News





WRAP UP...

WHAT ARE YOUR
WORST FEARS ABOUT
TRUSTEES?