

TRUSTEESHIP AS SENSEMAKING: PREPARING COLLEGE TRUSTEES FOR
LEADERSHIP

By

Michael Donovan McCord

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Advisor:

Michael Neel, Ph.D.

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Executive Summary

Martin Methodist College is a small liberal arts college in Pulaski, Tennessee. Pulaski is in the rural south-central region of the state, and Martin serves as the primary institution of higher education for the area. The leadership of the college is committed to helping students from that region and envisions the college becoming “the epicenter for education, healthcare, church and community leadership, and workforce development in south-central Tennessee and a national model for church-related higher education in rural America” (Martin Methodist College, 2021). In the initial interviews I conducted with the college’s administration and trustees for this study, trustees expressed interest in improving the experience and effectiveness of the board of trustees that largely centered on support (onboarding and ongoing) and understanding appropriate roles. This study supports the board by examining how trustees are trained and supported in their work as trustees at Martin while examining their work through the lens of sensemaking.

Boards of trustees are a central component of American higher education institutions, “hold[ing] a unique position concerning stewardship of the institutions they serve, a position not shared with students, faculty, alumni, donors, regulators, or others in the community” (Association of Governing Boards, 2019). Much of the literature on trusteeship centers on the role of fiduciary responsibility that uphold the organizational documents and mission of a college, while ensuring adherence to state and national laws and regulations (Payette, 2001). Investigating the experiences of Martin’s trustees through the theoretical lens of sensemaking can capture how trustees understand their fiduciary duties within the broader organizational context

by developing relationships and by developing relationships and building trust between the board and the larger community. (Degn, 2015; Gioia & Thomas, 1996; and Kezar, 2013).

Sensemaking comprises a conceptualization of how people understand and respond to complex, novel, or multivariant information that is not otherwise explained by a previously understood scenario (Weick, 1995). Using sensemaking to conceptualize trusteeship, I examine how Martin's trustees experience onboarding, ongoing training, and relationship building as resources to comprehend their role within the community and exercise their fiduciary responsibilities.

Research Question 1: How do Martin's trustees understand their fiduciary responsibilities?

Research Question 2: How do trustees experience relationships with members of the campus community as resources that enable their trusteeship?

Research Question 3: How do trustees experience support that enables their role?

a: How have trustees experienced opportunities for onboarding?

b: How have trustees experienced opportunities to receive ongoing support?

c: How have trustees experienced opportunities to develop relationships with members of the campus community?

Building upon early research examining trustee orientation (Williams-Goldstein, 2018), I developed a survey tool to investigate how trustees experience 1) their role as fiduciary agents of the college, 2) onboarding and ongoing training that supported these functions, and 3) interactions with future students, current students, and faculty. I sent the survey to all 35 trustees active at the college, and 21 (60%) responded. Using information from the survey, I completed a

series of one-on-one interviews with seven volunteers of the 21 active trustees who responded to the survey (33%).

The survey responses indicate the following: 1) Trustees understand the importance of their fiduciary responsibilities but experience frustration over a lack of onboarding and support. 2) Trustees find relationships with the campus community to be deeply relevant to their responsibilities and would like additional opportunities to form relationships. 3) Trustees have not experienced a comprehensive approach to onboarding or ongoing support, and they believe such an approach would enhance their experience. The subsequent interviews confirmed these findings and provided them context. Two findings from the interviews clarified opportunities to improve trustees' experience.

Figure 1

Key Findings from Initial Observations



Key Findings

1. Frustration over lack of organized onboarding and ongoing support.
2. Limited opportunities for developing relationships limits understanding of the campus.

First, interviewees expressed frustration with the lack of an organized and substantive program for onboarding and ongoing support of trustees. Some indicated this lack of support created divisions within the board between long-serving members and newcomers because of the

specific knowledge and comfort level of long-serving trustees compared to newer trustees.

Second, interviewees identified a lack of opportunity to develop relationships with students and faculty, and they all indicated such affordances would improve their ability to make sense of their responsibilities as trustees.

The recommendations for improving the experience and effectiveness of Martin's trustees that follows from these findings are organized using sensemaking as the theoretical framework (Degn, 2015; Gioia & Thomas; 1996; Kezar, 2013; and Weick, 1995). The recommendations to the trustees for improving their experience are as follows:

1. Develop a comprehensive onboarding experience for all new trustees that includes orientations to their fiduciary responsibilities as well as opportunities to build relationships with members of the campus community.
2. Implement a strategy to provide ongoing, formative learning experiences that are both technical and relational.
3. Design multigenerational, multidisciplinary community learning groups.

Taken together, these recommendations aim to create an atmosphere of continuous improvement through shared learning and governance while also providing trustees with meaningful learning experiences to better make sense of their roles through a comprehensive learning initiative.

Trusteeship as Sensemaking: Preparing College Trustees for Leadership

The genesis of this study stems from my own experience as a college trustee. I have a unique professional position that affords me an opportunity to serve as a trustee at seven colleges and universities. It is a complex and rewarding experience that comes with a steep learning curve, compounded by the way I began my tenure. I joined these boards at their regularly scheduled fall meeting and was provided minimal formal orientation, onboarding, or training. Out of the seven institutions, only one offered orientation, and it was a three-hour affair immediately preceding the first meeting. We spent those hours reviewing finances, meeting members of the cabinet, and touring the campus. None of the colleges offered an orientation that defined my role, shared expectations, or otherwise prepared me for the work of trusteeship. In fact, after nearly six years of service, I have experienced only very limited forms of formalized training or support. Entering into this study, I wondered if this experience was typical for trustees and if this lack of support influences other trustees' abilities to make sense of their responsibilities.

Many new trustees report experiencing rather challenging leadership responsibilities with little preparation and the underlying assumption that they would simply adapt to requirements (Stine, et. al, 2012). Many are unlikely to adapt, however. The majority of trustees across the country report receiving little or no formal onboarding or continuing education (Payette, 2001). Without clear expectations, resources, and experiences to prepare individuals for leadership, members may find themselves underprepared and unable to enact their responsibilities, and “most boards just drift with the tides. As a result, trustees are often little more than high-powered, well-intentioned people engaged in low-level activities” (Chait et al., 1996). It is

possible, then, that this kind of activity consumes the time and energy of the Boards while the essential responsibilities go unmet.

Much of the literature regarding trusteeship revolves around the practice of fiduciary responsibilities that uphold the organizational documents and mission of a college while ensuring adherence to state and national laws and regulations (Payette, 2001). Given this framing, the research concerning trusteeship and trustee training generally centers on the development of these technical skills (Kezar, 2004). This study aims to widen the lens through which we understand trusteeship by recognizing a trustee's role is more nuanced than suggested by a technical definition of fiduciary responsibility. While such responsibilities are crucial to trustees' work, a unidimensional view of trusteeship cannot adequately explain the role of a trustee as a leader (Kezar, 2013). This inadequacy is evident especially when trustees must make significant decisions (e.g., establishing or discontinuing academic programs) that may fall outside their areas of professional expertise or experience.

Some scholarship examining senior governance of colleges and universities suggests that the practice of senior leadership, similar to that of trusteeship, extends beyond a set of technical duties and is better understood through the lens of sensemaking (Degn, 2015; Gioia & Thomas, 1996; and Kezar, 2013). Sensemaking is a theoretical conceptualization of how people understand and respond to complex, novel, or multivariant information that is not otherwise explained by previous experience (Weick, 1995). The theory suggests that individuals take formerly known artifacts, frameworks, experiences, and social interactions as resources to comprehend new information or experiences. From this perspective, every trustee begins their service with specific experiences, perspectives, and knowledge that they access to understand

their work as a trustee. Trustees are then offered additional artifacts and frameworks from the college through orientation and training like mission statements, organizational structures, financial documents, and the wider concept of fiduciary responsibility. The trustees then use these resources to make sense of the novel challenges they confront as leaders.

Crucially, sensemaking is rooted within a community of practice and considers the essential role of relationships and social interactions within the community. Given trustees' limited interaction with the community, the role of relationships and trust building presents unique challenges. As Kezar (2004) identifies in a study examining effective forms of governance in a collegiate community, "leadership, trust, and relationships supersede structures and processes in effective decision making." This emphasis on trust and relationships challenges the primarily technical approach to trustee preparation; it centers the work of trustees within the academic community, where their leadership is enabled by their relationships with the community.

This study elicits the views of trustees at Martin Methodist College to understand trustees' experiences and seek ways to improve their shared work. Applying the concept of sensemaking, I am particularly interested in examining how trustees are prepared for their roles through the sharing of technical frameworks (mission statements, organizational structures, and fiduciary responsibilities) while also being integrated into the community through relational experiences.

Partner Organization: Martin Methodist College

Martin Methodist College is a small liberal arts college in Pulaski, Tennessee, south of Nashville. The college is led by President Mark La Branche and 35 active trustees from across

middle Tennessee. Given the proximity to Nashville, several trustees are influential business and educational leaders from the city. Others are local leaders from Pulaski and nationally recruited alumni. College leadership commits to serving students from the local region and envisions the college becoming “the epicenter for education, healthcare, church and community leadership, and workforce development in south-central Tennessee and a national model for church-related higher education in rural America” (Martin Methodist College, 2021). About one third of the students are first-generation college students, and most (56%) are Pell eligible, or students who have the highest need for financial assistance. In the initial interviews I conducted with the College's administration and trustees, several members shared these missional priorities with a sense of pride and as an important reason for their decision to serve Martin.

This capstone study comes at a particularly challenging moment within the life of the college. Following a series of difficult personnel challenges involving the former president and other senior leaders, Martin welcomed Mark La Branche as the 31st president in 2017. La Branche led the college through a difficult transition that required rebuilding trust between the trustees and the president’s office. In my initial interview with President La Branche to gauge the institution’s interest in trusteeship research, we engaged in a wide-ranging conversation about the trustees, the recent institutional challenges, and the mutual interest in how Martin engages, trains, and supports its trustees. La Branche acknowledged that while restoring trust was difficult, he felt that the board was ready to move forward with new energy, commitment, and direction. This study aims to support the board by examining how trustees are prepared and supported in their work at Martin.

During their spring 2019 meeting, the board approved a financial appropriation to engage a board consultant to increase the “effectiveness and meaningfulness” of the trustee experience. While the time at which this consultant would begin was not precisely defined, it seemed this consultant would begin work in tandem with this research. This commitment to improvement was encouraging, and the college’s willingness to participate in this study seemed to indicate the commitment of the trustees to take meaningful steps to improve the experience of trustees. In March of 2020, COVID-19 began to spread across the country and wreak havoc on higher education. Small, rural colleges like Martin were particularly vulnerable. The college canceled the consultant, and then announced a potential merger with the University System of Tennessee. With that said, the board has continued to support this study with an interest in improving the understanding of trusteeship.

Lack of Trustee Preparation and Support as a Problem of Practice at Martin

During my initial campus visit, I met with administrators and joined the trustees for a meeting. Both experiences revealed two potential problems of practice. Both trustees and administrators expressed that some members were not prepared for their roles. Trustees also identified that there was no organized manner in which they received ongoing support. In both cases, the lack of preparation and ongoing support is likely to impede the work of the trustees and to limit their ability to enact their full responsibilities. For example, the administrators indicated that without proper orientation and onboarding, trustees would often “overstep their bounds” and “micromanage” certain aspects of the school. On the other hand, the trustees expressed frustration with the feeling that the board was segmented into insiders who understood their roles and outsiders who had only a limited understanding of their responsibilities. This

initial evidence suggests that Martin may have a challenge with how they offer onboarding and ongoing support to their trustees in a way that is causing frustration and limitations for the board of trustees. The following section will place this problem of practice within the existing literature surrounding trusteeship and trustee support as a way developing the groundwork for improvement recommendations.

Literature Review

Trusteeship is a form of shared governance that requires individuals to collectively ensure the financial, legal, ethical, and missional direction of the institutions they serve. This work requires a high level of knowledge of the institution, its operations, and its academic regulations. However, recent literature indicates trustees have a responsibility to develop significant relationships of trust to help them bridge the institution across its various stakeholders and make sense of the challenges confronting the institution.

A Historical Perspective of Trusteeship

Higher education in the United States was primarily birthed out of organized religion as a way to train new clergy for the growing country. These early institutions were guided by highly localized boards of trustees with strong connections to both the church and the community (McPherson & Shapiro, 1999). This close connection to the institution, paired with the fact that the trustees often personally funded the operation of the college, created a governance system that could easily and quickly identify and address problems: “These representative trustees had the ability to judge the local institutions. If the college was not providing education consistent with the desires of the local community, then it was readily apparent” (Brown, 1997). As the institutions grew in stature and as their academic programs broadened, the trustees had less

ability to judge the effectiveness of the institution, so their influence diminished (Brown, 1997). With this shift in governance, there arose a new role for faculty as they to organize and assume more leadership within the institution.

The emerging role of faculty in the early 20th century set the stage for what has become a form of shared governance of higher education institutions (Green, 2008). In this form of governance, there are three primary branches of leadership: administration (president and cabinet), faculty, and trustees. The administration leads the day-to-day operation of the college, with a focus on fiscal responsibility, fundraising, and organizational leadership (Hendrickson, et al., 2013). The faculty are responsible for ensuring the academic integrity and freedom of the institution while also providing observational influence over the administration (McPherson & Shapiro, 1999). The primary role of trustees is to ensure the future of the college by enacting their responsibilities over the financial, legal, ethical, and missional practices of the college (Payette, 2001). It is within this confluence of leadership that trustees are called upon to offer directional, visionary leadership to ensure both the mission and the future of the institution is secure.

Responsibilities of Trustees

The Association of Governing Boards (2019), a professional association of college executives and trustees, frames trusteeship in terms of unique fiduciary responsibilities:

Members of the governing boards of colleges and universities hold a unique position concerning stewardship of the institutions they serve, a position not shared with students, faculty, alumni, donors, regulators, or others in the community. Governing board members are fiduciaries.

Interestingly, Payette (2001) found that few trustees have a clear understanding of what “fiduciary responsibility” actually means and “the term is rarely defined yet frequently used as a justification for action or inaction by trustees and officers.” Given this lack of clarity, Payette developed the following definition:

Fiduciary responsibility is the legally enforceable duty of trustees, the president, and officers of the corporation to fully abide by the corporation’s by-laws as well as applicable federal and state laws; and, regulations of accreditation commissions, collective bargaining agreements, professional associations, and organizations the institution has committed to uphold.

In short, the central trustee role is conceptualized in most scholarship and institutional documentation as a kind of fiduciary responsibility encompassing financial, legal, ethical, and missional purpose keeping.

Barringer and Riffe (2018) move beyond the board’s localized fiduciary role, envisioning trustees as “boundary spanners between higher education institutions and the larger economy.” On this conception, board members serve as microfoundations that connect local and regional resources with the needs of the institution. Through these networks of connections, trustees hold significant influence over the priorities and direction of the institution. This broader understanding of the trustees’ role builds upon the fiduciary framework by including more specific organizational knowledge, clearer lines of institutional accountability, and the development of trust among trustees and the senior administration. These kinds of interpersonal and relational responsibilities require a form of preparation and support that exceeds traditional technical fiduciary skills (Payette, 2001).

Kezar (2004), examining the governance systems of colleges, suggests that the development of relationships, trust, and leadership within the organization is more effective than authority or clear governance systems. From this vantage point, decision-making is central to the role of the trustee, and to make decisions effectively, a board must take seriously the task of developing relationships, trust, and leadership. Kezar (2004) identifies that while restructuring and other structural changes increased efficiency, only “leadership, relationships, and trust have strong potential for increasing effectiveness.” Commodore (2019), researching the processes used by trustees to select college presidents, found that trust building and relationships were central to developing trustee decision-making systems. Specifically, Commodore (2019) found that during the interview process, the level of trust between trustees and candidates is often more influential than the more technical aspects of decision-making. These findings suggest that trust and trust-making relationships centrally support trustees and ground the argument that trusteeship requires more than a working knowledge of the technical aspects of fiduciary responsibility.

Although many have discussed how to train boards to be more effective, limited empirical research has outlined constructs of effectiveness for trustees (Dika & Janosik, 2003). Chait (1996), an early researcher in the area of board effectiveness, identified six related competencies: contextual, educational, interpersonal, analytical, political, and strategic. Michael, Schwartz, and Cravenco (2000) build upon these findings to articulate that the “level of knowledge, influence, quality of relationship, and level of involvement in management functions are valid indicators of individual trustee’s effectiveness.” Here again, the literature deviates from traditional thinking by suggesting that trustee effectiveness involves more than technical

knowledge of higher education or financial management. Instead, there continues to be evidence that effectiveness may be more relational and social than previously thought.

In light of the significant and complex role of trustees and their role within an institution, it seems reasonable to consider how trustees are oriented, supported, and equipped with the information and relationships necessary to fulfill their responsibilities.

Trustee Support

Trustees are not generally recruited based on their understanding of college operations or their experience with college students (Dika & Janosik, 2003). Stine et al. (2012) find that less than 30% of trustees have any professional experience in higher education. Instead, trustees are generally selected based on specific skills (e.g., legal or financial), political capital, and financial means (or access to means). Given this dynamic, it seems important to understand how trustees experience onboarding and training for new and existing members. Rall (2014) claims that “Trustees have to know enough about and actually execute the basic responsibilities of their roles on the board.” Nevertheless, in a national study on trusteeship 65% of the respondents reported spending four hours or less on training throughout their tenure (Association of Governing Boards of Universities and Colleges, 2009). Only 16% of colleges nationwide reported a requirement for trustees to be onboarded or to receive formal orientation (Davis, 1997). When trustees do experience training, the offerings appear to be formulaic and focused on traditional fiduciary responsibilities of finance, mission, strategic priorities, and academic programs (Stine et al., 2012). These factors are likely to leave many trustees feeling underprepared for their work (Selingo, 2007).

The literature reviewed above highlights a system of leadership that actively recruits college trustees without direct experience in higher education and under which only a handful of institutions require new members to be oriented to their work. Furthermore, the existing training formats are generally technical in nature and do not include relationship building, which continues to emerge as central to the sensemaking work of trusteeship. With that said, there is evidence that training can be formative for trustees and can strengthen their work (Davis, 1997, Dika & Janosik, 2003, and Michael, Schwartz & Cravencoco, 2000). For example, institutions identified as having effective boards reported an “educational process characterized by consciously created opportunities for education and development” (Dika & Janosik, 2003). And so it seems likely that the way trustees are prepared and supported for their work is particularly influential in helping trustees understand and enact their responsibilities. Now, consider a conceptual framework for holding these complex responsibilities together.

Conceptual Framework: Sensemaking

Sensemaking is a theoretical conceptualization of how people make sense of complex, novel, or multivariant information that does not otherwise fit into a previously understood scenario (Weick, 1995). The theory suggests that all humans use artifacts, frameworks, experiences, and social interactions available to them to help make sense of new information or experiences. Weick (1995) suggests that sensemaking is rooted in both individual and relational activities that help organize new experiences into existing frameworks and relationships to help create mutual understanding.

A growing base of research casts senior leaders as navigating the complexity of higher education through the lens of sensemaking, and this literature adds significant nuance and

complexity to a line of research previously focused on the technocratic duties of senior university personnel (Degn, 2015; Gioia & Thomas, 1996; Kezar, 2013). With that said, little research has examined trusteeship, in particular, through the sensemaking conceptual framework (Williams-Goldstein, 2018). In a study examining the role of professional experiences as sensemaking resources for trustees of public institutions, Williams-Goldstein (2018) found that both professional experience and trust-based relationships were key resources in the sensemaking work of the board.

Trustees are asked to make highly complex decisions about the direction of an organization in a market with which they may have little technical experience, so preparation that includes both the more technical framework of fiduciary responsibility and a trust-based, relational approach has become increasingly important for trustees as they navigate the complexity of higher education (Williams-Goldstein, 2018). Given the complexity of trusteeship and Martin Methodist College's interest in improving the preparation and support of its trustees, sensemaking offers a particularly rich framework to support the design of this investigation.

Research Questions

The literature sets a rather fertile ground from which to consider ways to improve the trustee experience at Martin by looking at how trustees are prepared and provided ongoing support throughout their tenure. Additionally, the sensemaking framework invites into this conversation the role of relationships and opportunity to engage in relationships with the community. Taking these considerations into perspective, this study will be guided by these research questions:

1. How do Martin trustees understand their fiduciary responsibilities?

2. How do trustees experience relationships with members of the campus community as resources that enable their trusteeship?
3. How do trustees experience support that enables their role?
 - 3a: How have trustees experienced opportunities for onboarding?
 - 3b: How have trustees experienced opportunities to receive ongoing support?
 - 3c: How have trustees experienced opportunities to develop relationships with members of the campus community?

Methods

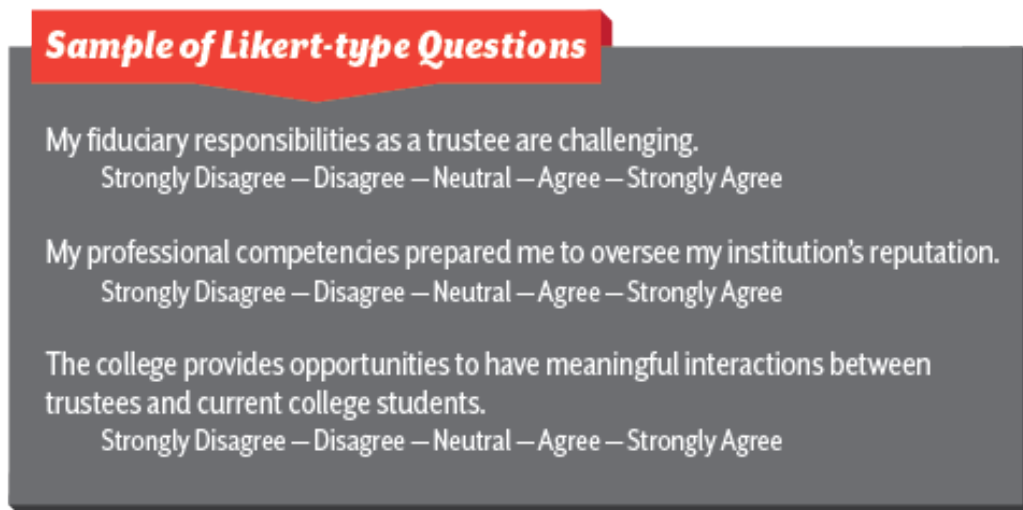
This study deployed a mixed-method approach across two phases. Phase 1 consisted of surveying the active members of the Martin Methodist Board of Trustees ($n = 35$). The survey tool was designed to examine the members' current views of the board, their responsibilities, their onboarding, ongoing training, and opportunities for relationships with community members (see Appendix A).

The survey tool is an adaptation of a tool created by Williams-Goldstein (2018), who examined similar questions that sought to understand the role of trustees' professional orientation in the preparation of trustees in New Jersey with no higher education background. I narrowed the focus of the survey's evaluation of fiduciary responsibilities while also expanding sections exploring onboarding and ongoing support. Using a similar structure, I developed an additional section of questions examining the ways in which trustees were afforded opportunities to build relationships with the community. The design included both Likert-type evaluative questions and open-ended responses in sections that examined past professional experiences, experiences engaging fiduciary responsibilities (capital assets, financial assets, human resources, and

institutional mission/reputation), experiences with onboarding and ongoing forms of training, and opportunities to develop relationships with future students, current students, and faculty (see Figure 2).

Figure 2

Sample of Likert-type Questions



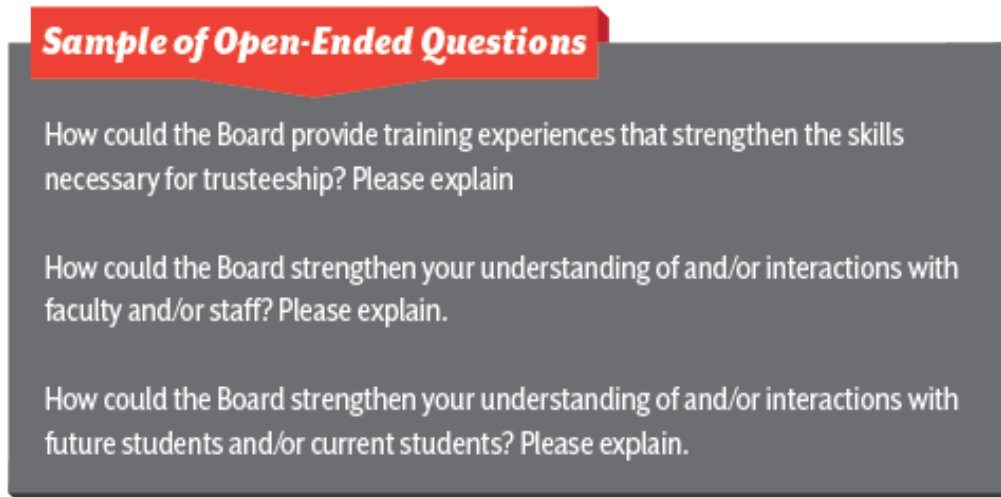
The use of the open-ended responses allowed participants to provide more generative feedback in addition to the more evaluative questions. For example, I asked open-ended questions to provide space for respondents to generate creative ideas for improving the experience (see Figure 3). I was particularly interested in comparing these anonymous open responses to the those recorded during the interviews in Phase 2.

The purpose of the survey was to develop a general understanding of how trustees experience their roles on the board while specifically focusing on questions that highlight their fiduciary responsibilities and opportunities for relational development. The survey provides a basis for trustees to share perspectives while remaining anonymous. Such anonymity can be especially helpful when a researcher studies a relatively small population in which levels of

power may influence responses. One of the limitations of closed response surveys is that they

Figure 3

Sample of Open Response Questions



may limit perspective by narrowing responses. The addition of open-ended questions helped to round out the survey tool by including more generative responses that remained confidential.

The trustees were introduced to the research and invited to participate by President LaBranche. I followed up numerous times with both general and personalized emails to encourage greater participation. Of the 35 trustees, 21 participated in the survey, and three of those failed to complete the entirety of the survey. Seven (20%) of the trustees volunteered to participate in interviews. Three women and four men engaged in one-on-one, semi-structured virtual interviews.

Phase 2 consisted of semi-structured, one-on-one interviews with trustees who volunteered within the survey ($n = 7$). Given the nature of this quality improvement study and the size of the participant pool, the interviews provided a method by which to qualify and draw findings from the survey responses, which were largely quantitative in nature. Specifically, I

sought to understand, through their own words, how each trustee experienced onboarding and ongoing support (see Appendix B). I was also interested in how trustees experienced relationships with different facets of the community, and the interviews allowed participants to share creative ideas for possible improvements. Due to the COVID-19 pandemic, I conducted and recorded all interviews using online video conferencing software, and each interview generally lasted about 45 minutes to an hour.

I designed the interviews to develop a more nuanced understanding of how members experience their roles as trustees. I used some generalized findings from the survey to develop the follow-up questions used during the interview. For example, the survey responses to a question about onboarding were mixed. This finding prompted me to ask interviewees to clarify their onboarding experiences. This follow-up helped to make sense of the survey findings and to place them within the context of the organization. Finally, the interviews were essential for developing ideas to improve the trustee experience. Such generative questions allowed members to be co-creators in the recommendations stemming from this research.

Data Analysis

The respondents to the survey represented 60% ($n = 21$) of the trustees, and 43% ($n = 9$) of respondents were women. The limited racial diversity among board members was noted in the study's early observations. Only one respondent identified as African American, and all other participants identified as non-Hispanic white. In keeping with the national average, 71% of the participants were 56–74 years old. Only one respondent identified as an education professional. All others identified their vocations as either professional ($n = 7$) or business ($n = 13$), and six indicated they were retired. The survey data from the closed questions helped me identify trends

and shared experiences of trusteeship at Martin. Due to the limited population and response rate, a broader correlational analysis of the data would likely not provide the kind of reliability that would be helpful for this study. As a result, I primarily used the data from the closed survey responses to identify trends and insights that informed the interview phase of the investigation.

I analyzed both the open-ended survey responses and the transcribed interviews using a deductive approach seeking common themes, understandings, and experiences helping to explain the experience of being a trustee at Martin (Crabtree, & Miller, 1992). For example, I looked for themes regarding how trustees began their terms of service, how they understand the role and function of the trustees, how prepared they felt for the work, and how connected they feel to the organization and its people (future students, students, and faculty). I then examined ways in which the interviewed trustees felt the experience could be improved with particular attention given to onboarding, ongoing training and support, and the development of relationships with key aspects of the community (future students, students, and faculty).

After identifying common themes across the interviews, I performed a similar process with the data from the open-ended survey response. I paid particular attention to responses reflecting on ideas that could improve the trustee experience. I then compared these findings with those of the interview responses to identify trends and variations.

The final analysis triangulated the themes identified from the survey responses, the open-ended response findings, and the trends from the fixed response data from the survey. This process of testing findings across three types of responses allowed me to identify both confirming and conflicting responses in a way that highlighted areas prime for improvement or

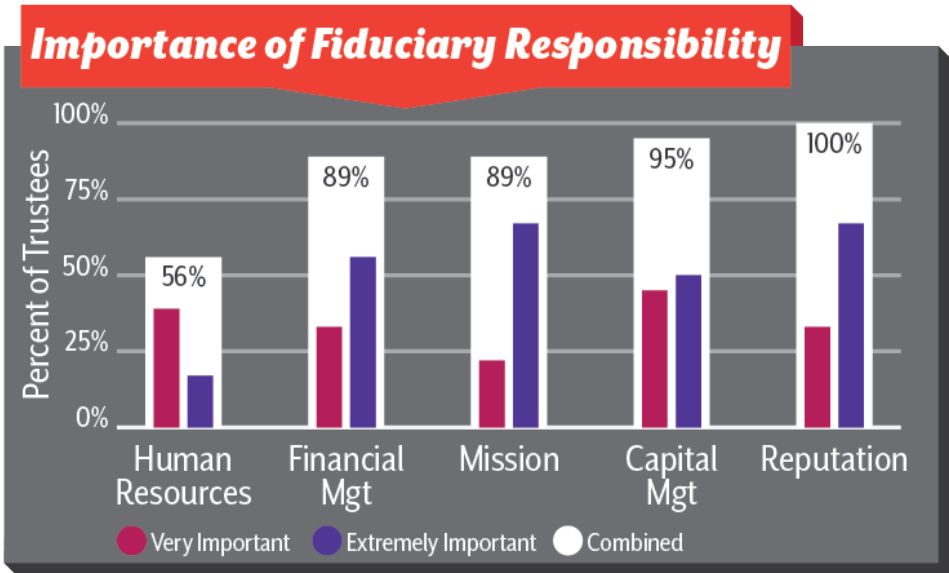
increased support.. In many ways, the interview and open-ended responses helped to explain the broader survey data by enriching the findings with context and specific experiences.

Findings

Research Question 1: How do Martin Trustees Understand Their Fiduciary Responsibilities

Trustees understand the importance of their fiduciary responsibilities and yet experience frustration over lack of onboarding and support. Overall, it seems that the trustees at Martin understand the importance of their fiduciary responsibilities and the more technical aspects of trusteeship (e.g., financial management, human resources, and mission keeping; see Figure 4). With that said, the interviews revealed a more complicated picture. While the trustees value their roles and view them as important, all interviewed trustees expressed frustration about the lack of preparation and the long time it took to feel comfortable enacting their roles as trustees.

Figure 4
Trustees Gauge Importance of Fiduciary Responsibilities

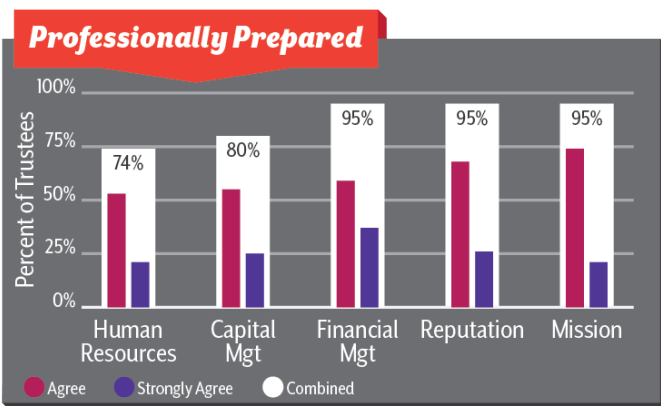


The trustees responded to several survey questions regarding their understanding of and experience with their fiduciary roles within the survey tool. Most respondents felt that the fiduciary roles were within their professional skillsets (52.4%), and nearly half (47.6%) indicated their fiduciary responsibilities were challenging. When surveyed across the core areas of fiduciary responsibilities, the majority of trustees indicated the following responsibilities to be either very or extremely important: capital asset management (95%), financial asset management (89%), human resource management (56%), institutional reputation management (100%), and institutional mission management (89%).

The surveys confirmed the importance and value of the trustees' fiduciary roles while also highlighting that the majority of the trustees feel professionally prepared to exercise the following fiduciary responsibilities: capital management (80%), financial management (95%), human resources (74%), institutional reputation (95%), and institutional mission (95%; see Figure 5).

Figure 5

Professional Experiences Prepares Trustees for Leadership



Yet, the interviews suggested a more complex scenario with certain challenges facing trustees. Each interviewee shared a sense of commitment and value in their fiduciary responsibilities. There was a clear sense of pride in upholding the college's mission while also managing finances and institutional operations. At the same time, there was near-unanimous frustration over the lack of orientation or ongoing support. This frustration was expressed as follows:

- *A senior executive:* After serving on the board for more than 10 years, this trustee reflected on his experience joining the board. Despite being a highly accomplished leader, this trustee acknowledged that his role was significantly different than anything he had previously experienced. He laughed as he described how he had received no orientation or set of expectations for the meetings or for his role, stating, "that's really one of the shortfalls...shortcomings of the Martin Board." In fact, he shared that he "didn't even know what to wear to the meeting" and that when he showed up, he "was the only one who didn't wear a suit and tie." This kind of discomfort and lack of familiarity seemed to influence how he began his term as a new trustee: "I was nervous to speak up...thinking I would say something stupid" because running a business "doesn't mean I have a clue about educating students and the best way to do it right."
- *A local leader:* A more recently elected trustee was vivid in describing her frustration with joining the board. "Nobody even reached out to me to tell me what to expect," she said. Instead, she recalled that she arrived at the meeting and tried to "learn as she went." It seemed that much of her frustration centered on how a lack of onboarding created a

sense of division between her and the longer-serving members who had “picked up on the language and expectations.” She said that “it was like there were two groups [among the trustees]...those who knew the language and those who didn’t.”

- **A business owner:** Serving just over three years, this trustee represents one of the two respondents with a higher-education background. It was clear in the interview that there was a level of ease he had with the terminology and structure of the college. He previously served on the alumni board and so had specific previous knowledge of Martin. He also described himself as someone who is “very verbal, hadn’t been all my life, but I am now, I guess, and so I don’t hold back. I tend to be very active and very involved.” He also said, however, “it took me a while before I felt comfortable participating in the meetings.”

While the trustees reported feeling they knew their primary fiduciary roles, they did not feel fully prepared to make sense of those responsibilities within the context of the college. Despite their particularly rich professional experiences, they faced challenges transitioning into trusteeship.

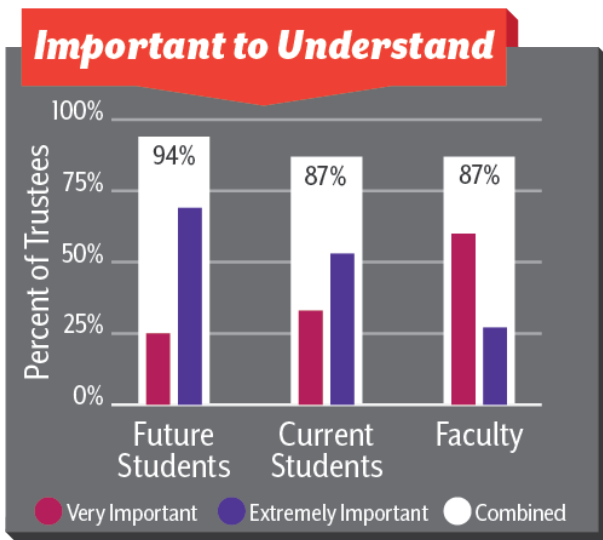
Research Question 2: How do Trustees Experience Relationships with Members of the Campus Community as Resources That Enable Their Trusteeship

Trustees find relationships with the campus community to be deeply meaningful to their responsibilities and would like additional opportunities to form relationships. Both the survey and the interviews asked participants to gauge the importance and experiences of relationships with three campus community groups: future students, current students, and faculty (see Figure 6). The trustees identified these three communities as important groups with which to understand

and form relationships. The trustees also indicated they would like the college to provide more opportunities to interact with all three groups. More importantly, when asked about these kinds of experiences, all of the interviewees became animated and energized and spoke of direct experiences with students and faculty. They often used phrases such as “life giving” when talking about relational experiences with the community.

Figure 6

Trustees’ Perception of Importance in Understanding Community Members



One trustee, in particular, discussed at length the ways he sought out experiences with students and faculty in the classroom. His voice raised and his speech quickened as he told stories of sharing his professional experience with students and then hearing their stories. He then expressed that the trustees needed such engagement as a way to move not only “beyond expertise, but into really using your expertise for action.” Another trustee, who had served for more than 10 years, shared a particularly rich experience in which trustees toured the campus and met with groups of students and faculty to learn about different challenges facing the college:

“We went from dorms to the student union to athletic offices...and had people [in each location] speak to each us about what they do and what they really need.” This experience, he indicated, influenced what “became prioritized into how the college has renovated a lot of the buildings.” Finally, a trustee who is a local business owner described how interviewing potential students for scholarships really helped him “understand where the students were coming from and what they needed.”

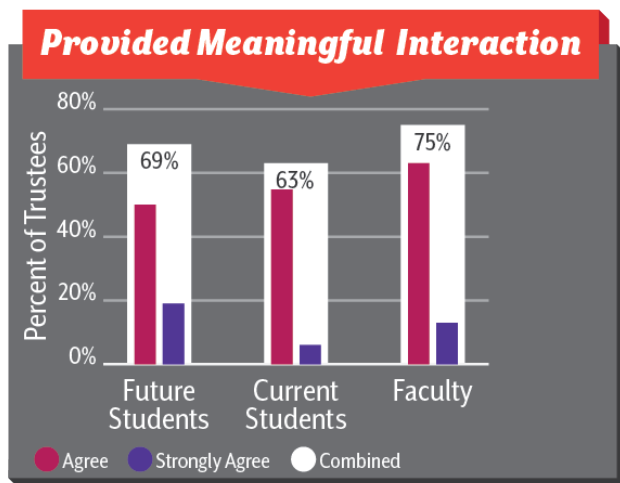
When considering the importance of interacting with different aspects of the campus community, trustees identified future students as the most important to understand as a trustee (94%), followed by current students (87%), and the faculty (87%). While trustees valued all three groups highly, it was surprising that they scored future students as the most critical community group. This finding was affirmed in the interviews. All participants indicated high regard for having a working knowledge of future students’ needs. One trustee noted, “our most important fiduciary responsibility is to 10th graders.” The same participant later stated that trustees are “responsible for planning for the future student,” while the administration and faculty “serve the current students.”

As seen in Figure 7, the results of the survey also indicated that the majority of trustees agreed or strongly agreed that the college provided opportunities for meaningful interaction with future students (69%), current students (63%), and faculty (75%). With that said, only a limited number strongly agreed they were provided these kinds of experiences likely indicating there may be opportunities for improvement: future students (19%), current students (6%), and faculty (13%).

The interviews suggested that the situation was indeed more complex than the initial findings reveal. While the trustees felt they had interactions with the community groups, they all desired more meaningful interactions in which, as one participant described it, they “get to know” what students and faculty are “going through” and how “they can make it better.” The trustee described how they had once toured the dorms with students and realized how important it was to improve the residential-life experience.

Figure 7

Trustees Provided Meaningful Interaction with Community Members



As a final observation, it should be noted that this study did not specifically capture in the survey how trustees experienced relationships with each other, although this understanding emerged in the interviews. Inter-trustee relationships became a common theme in the interviews, as trustees expressed how little they knew each other. Specifically, trustees expressed experiencing division within the board between those who were new (<10 years) and the rest of the members. Much of the energy in this division revolved around knowing the community and

understanding how to enact their roles among the trustees. Some pointed to the lack of onboarding as a potential cause or contributing factor.

Research Question 3: How do Trustees Experience Support That Enable Their Role

Trustees have not experienced a comprehensive approach to onboarding or ongoing support, and they believe such an approach would enhance their experience. Both the survey and the interviews found little evidence of a comprehensive or intentional approach to onboarding or supporting trustees in their work. In the interviews, trustees shared that lunches with the former president or the board chair were the primary method for recruiting and orienting new members. All respondents expressed frustration with the lack of support as something that “limits [their] ability to do the work.” Some used phrases such as “that’s the Martin way” and “it’s Martin’s greatest challenge” when describing the lack of training and support for trustees. Both the survey responses and the interview participants expressed a desire for a more formal onboarding and ongoing training process.

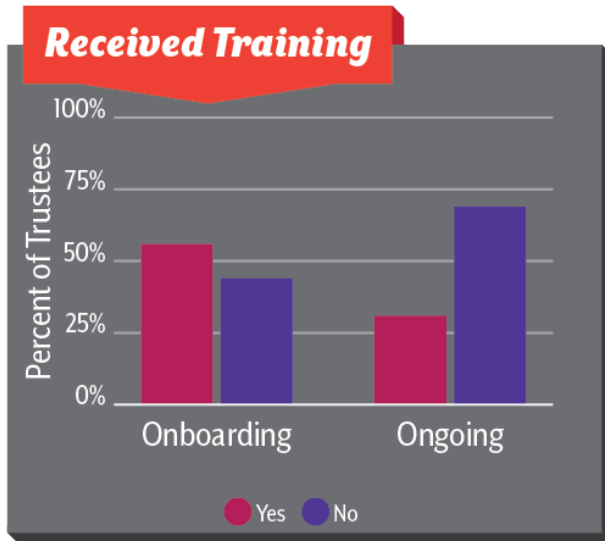
Research Question 3a: How Have Trustees Experienced Opportunities for Onboarding?

The lack of onboarding support creates frustration and delays in trustee interaction. The survey provided inconclusive results regarding trustees’ onboarding experiences when compared with the interview responses. While a majority (55.6%) of respondents indicated they had received onboarding, all of those interviewed indicated they had not received onboarding (see Figure 8). This disparity is likely due to conflicting working definitions of onboarding. For example, when I asked one member about their onboarding experience, they described it as follows: “I met the chair and the president for lunch, and they went over what they wanted me to do.” The same person later described the frustration of having no one prepare him for the role.

All of the trustees interviewed indicated they believed that a more-structured onboarding experience would have better prepared them to sooner serve as effective trustees.

Figure 8

Trustees' Perception about Receiving Support



There was also a shared desire for some sort of mentoring or partnering procedure wherein new trustees could be connected with existing trustees as a way to prepare them for the work. The CEO trustee shared, “I think it would help — maybe — to assign each new board member a mentor for a couple of meetings — to sit next to — [so they] can whisper in [the new trustee’s] ear and make [the trustee] more comfortable.” He continued on sharing how he felt during his first meeting, “I mean you’re on edge — you don’t know everybody and you’re afraid you’re going to say something stupid and that’s really the kind of basic thing you have to get over.” Several trustees seemed to indicate that the lack of onboarding created scenarios where members felt disconnected from each other and underprepared in ways that delayed their ability to participate fully in the board meetings.

Figure 9

Response From a Trustee Referencing Lack of Preparation

“I mean you’re on the edge... you don’t know everybody and you’re afraid you’re going to say something stupid and that’s really the kind of basic thing you have to get over.”

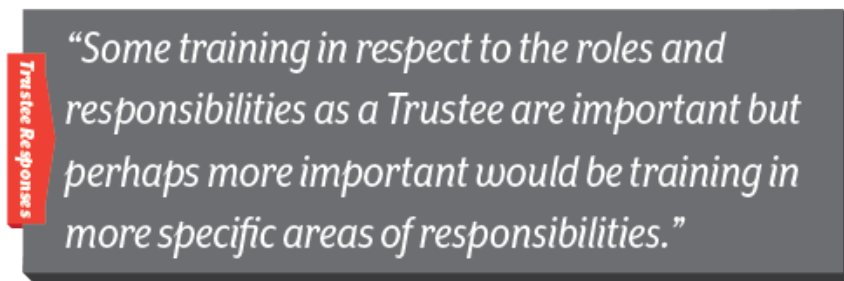
Research Question 3b: How Have Trustees Experienced Opportunities to Receive Ongoing Support

Trustees do not routinely receive ongoing support, and they believe such support would improve their experience. There was no evidence that the college provides any kind of ongoing training for existing trustees. When asked in the survey, 69% of the respondents indicated they had received no ongoing support. None of those interviewed shared experiences of ongoing training, and all of those interviewed expressed a desire for more and ongoing support. Both in the open responses within the survey and through the interviews, trustees expressed an interest in receiving training in finance, academics, financial aid, fundraising, and student recruitment. One trustee with experience in higher education shared that, “because fiduciary responsibility is the number one responsibility and fiduciary responsibilities absolutely include legal responsibility for oversight of the financials... leadership has a responsibility to make sure that every board member is in a position to interpret the information.” There seemed to be variety of perspectives about how to understand college operation, but an interest in increasing the amount of time dedicated to learning was common. For instance, some of the longer serving trustees pointed to a previous trustee retreat as an example of training they would appreciate. After an interview with

a longtime member of the board, I discovered this retreat was held once and was described as “basically a two-day-long, gigantic board meeting.” He also indicated that they shared several meals with trustees, administration, faculty, and some students. Despite the limited instances of such retreats, the idea of a learning retreat emerged in all of the interviews and in some of the open responses to the survey. For example, one trustee who is retired and has served on the board for five years responded to the survey: “Annual retreats might be good...inclusive of various training sessions conducted by professionals in every area.” Others indicated that this kind of experience would enable them to build relationships and understand the college at a deeper level.

Figure 10

Response from a Trustee About Training



Research Question 3c: How Have Trustees Experienced Opportunities to Develop Relationships with Members of the Campus Community

While trustees experienced opportunities to develop relationships with members of the campus community, they expressed a strong interest in additional experiences. The survey responses indicated that the trustees agreed or strongly agreed that the college provides opportunities for trustees to interact with students (62.5%) and faculty (75%). When asked about these experiences, those interviewed shared personal stories of meaningful interactions with

students and faculty during lunches and special events. Again, it was notable how the interviewed trustees changed their demeanor and level of energy when they were asked about experiences with students and faculty. They all indicated these experiences were some of the most meaningful aspects of their service as trustees, as it seemed to provide a sense of community and understanding that informed and empowered their work. While it is clear the college provides opportunities to interact with students and faculty, those interviewed all expressed a desire to have more meaningful interactions with students. For example, several trustees shared a desire to mentor students pursuing similar careers. Such ongoing, in-depth experiences with both students and faculty seemed particularly important to trustees. One trustee remarked, “some of the trustees would make different decisions if they knew this campus and knew these people.” Perhaps the most poignant moment came during an interview with an influential member of the board: “Our most important fiduciary responsibility is to 15-year-olds.” The trustee went on to describe how trustees are responsible for the future of the organization and therefore must be prepared to meet the needs of future college students.

Figure 11

Response from Trustee About Relationships with the Community

Trustee Responses

“Some of the trustees would make different decisions if they knew this campus and knew these people.”

Recommendations

Both the survey and the interviews provided open-response spaces for trustees to share how the college could better support the board and improve the trustee experience; both inform the recommendations I offer below. Where relevant, I ground the recommendations in the words of the trustees themselves, which allows me to situate the proposed initiatives for change within the community. This approach will provide Trustees the opportunity to implement these recommendations in a way that highlights and responds to the expressed needs of the board.

Recommendation 1: Develop a Comprehensive Onboarding Experience New Trustees.

The first recommendation is to develop a comprehensive and meaningful onboarding process that provides resources and relationships to prepare trustees for the complex role of leadership. This process may include the following steps:

- Develop a video series for on-demand orientation that orients trustees to the systems, practices, and organizational structures of the college.
- Host an in-person orientation to the campus that includes opportunities to review the video content, a tour of the campus, and substantive interactions with different facets of the community.
- Assign an existing trustee to each new trustee for a year of mentoring and relationship building.

This comprehensive approach to onboarding ensures that new trustees can access and practice both the technical and relational responsibilities of trusteeship. Training resources should be created to highlight the core fiduciary responsibilities as defined by the Association of Governing Boards, including financial, capital, and human resource management; institutional

organization and mission; state and federal laws and guidelines; and essential accreditation information. These training resources could be prerecorded and made available to all trustees throughout their tenure, thus serving as both onboarding and ongoing training resources. The creation of prerecorded, on-demand training accomplishes two objectives: reduction of stress on the administration to provide technical training and ease of access to instruction for all trustees throughout their tenure.

One of the common themes in the interviews was the cancelation of onboarding experiences. One trustee said, “I was scheduled to be onboarded, but something came up with the staff and it was delayed. I just decided to start my term of service anyway.” Similar comments were made by other trustees. The digital approach allows administration, faculty, and trustees to create resources in advance and use them for several cycles before the resourced need updating. In addition, the creation of the resources allows trustees to refresh their knowledge.

The in-person component of the onboarding would provide the opportunity for trustees to interact with the senior leadership regarding the information in the videos while placing the learning experience within the context of the campus community. Finally, the in-person experience allows new trustees to build relationships with the administration, faculty, fellow trustees, and students.

Finally, the introduction of a mentoring program was recommended by several trustees in both the survey and interviews. They expressed the desire to connect new trustees with existing trustees to build relationships, foster communication, and share expectations. Mentoring would help prepare new trustees for leadership while also addressing the division that some trustees have experienced between newer members and existing members. In addition, this kind of

learning experience enables mentors to share more nuanced information like what to expect in meetings and even what to wear to different functions. This kind of mentorship would reduce anxiety while also equipping new members with confidence to enact their responsibilities sooner.

Recommendation 2: Implement a Strategy for Providing Ongoing, Formative Learning Experiences.

The second recommendation is to develop a system of continuous learning experiences to ensure trustees remain oriented and supported in their work. While onboarding provides a solid entry into the work of trusteeship, many trustees serve for years without refresher learning experiences. It was also noted in the interviews that the changing of roles (committee membership, etc.) creates an additional learning curve for existing members. The implementation of a comprehensive, ongoing approach to supporting trustees could help keep trustees engaged. Such ongoing support could include the following resources:

- Develop a repository of videos to orient members to the different roles within the board (e.g., executive leadership and committee assignments).
- Create a learning segment for each board meeting to highlight different facets of the college.
- Relaunch the annual board retreat where members spend time with faculty, staff, and students, while focusing learning on a specific area of college operations and associated challenges and opportunities (e.g., athletics, recruitment, and development).

Building on the collection of onboarding videos, some trustees have recommended creating videos to orient them to different parts of the board. For example, when someone

changes to a new committee, they could watch the orientation video for that committee and feel more prepared for the work.

A number of trustees shared an appreciation of the moments when senior administrators highlighted specific areas of operation or challenges facing the college (e.g., recruitment, financial aid, and athletics). This kind of learning component could be added to all regular trustee meetings as a way of keeping members engaged around specific areas of work.

Finally, the former board retreat was a topic of conversation both in the surveys and the interviews. Trustees suggested the event return with a narrower focus on trustee learning. For example, the administration might lead a more expansive orientation to the student recruitment process while highlighting specific challenges and opportunities facing the college. This kind of immersive learning experience would help deepen the trustees' understanding of the operation while developing more meaningful relationships with the staff and each other. Trustees specifically mentioned financial management, student recruitment and retention, academics, athletics, and development as important areas of operation that could be addressed through training opportunities.

Recommendation 3: Design Multigenerational, Multidisciplinary Community Learning groups

The final recommendation is to design and implement a strategy for developing multigenerational, multidisciplinary learning groups that foster relationships while addressing critical challenges facing the institution. The findings in this study point to the importance of identifying and implementing a strategy by which to provide trustees with opportunities for both structured and unstructured interaction with members of the campus community as a way to

develop relationships that make sense of their responsibilities. Trustees shared specific examples of how helpful interactions with students and faculty are in placing their work within the context of the community and acknowledged a desire for more experiences with the members of the community. The interviews highlighted the value of these interactions while demonstrating an opportunity for better-organized experiences. This recommendation helps trustees see the strategic importance of relationship building by creating systems and interactions that help broker these relationships.

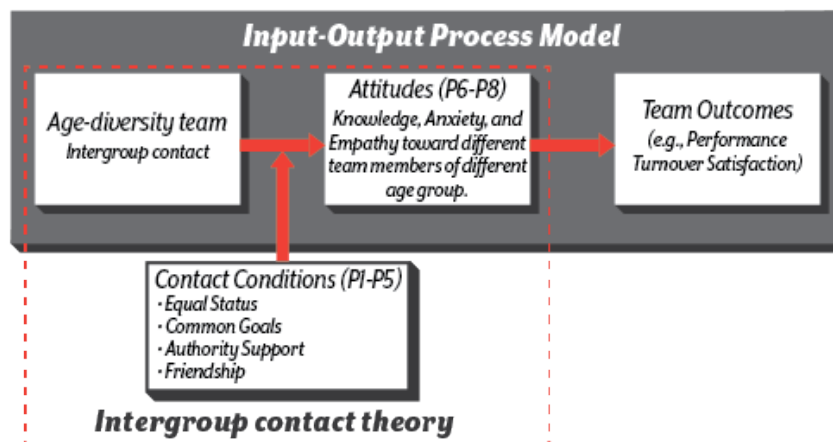
Within the context of building relationships, this study revealed inherent challenges to cultivating more meaningful relationships across diverse groups of community members. For this recommendation, I recognize the multigenerational and multidisciplinary intersectionality of the college campus. For example, the average age of the trustees is 68, and they are called upon to ensure the college serves incoming students 50 years younger. Likewise, trustees have specific professional experiences that are often outside the educational focus of trusteeship and the professional experiences of the faculty. This recommendation aims to account for this variation by developing a plan for shared work and learning.

The concept of sensemaking is helpful in developing a way of thinking about trusteeship that integrates both the technical nature of the fiduciary responsibilities with the importance of relationships when guiding the work of the college. Using this conceptualization of the work of trusteeship and taking into the account the intersectional nature of trusteeship, intergroup contact theory provides a robust and helpful framework from which to draw a novel approach to trustee support.

Intergroup contact theory suggests that intentionally forming working groups of individuals with various backgrounds, ethnicities, and ages decreases intergroup anxiety and prejudice and increases empathy (Allport, 1954, Choi & Jarrott, 2020, Pettigrew & Tropp, 2006, and Pettigrew & Tropp, 2008). Notably, these effects occur not merely because the group has been formed. Rather, Allport (1954) and Pettigrew and Tropp (2006) identified certain shared values of cooperation must be intentionally present in the intergroup experience, namely: 1) equal status across the team member composition, 2) common goals around shared work, 3) cooperation that values all members of the group, and 4) the support of authorities, laws, or customs (e.g., trustees and administration). These shared values provide the sort of environment in which the experience moves beyond a simple project and becomes a formative experience that helps to overcome biases and stereotypes by building relationships of trust (Choi & Jarrott, 2020; see Figure 12).

Figure 12

Intergroup Contact Theory Process Model



While much of the existing literature examines the utility of intergroup contact theory within settings of racial or ethnic, religious, and disability diversity, it is beginning to emerge within the multigenerational work setting (Choi & Jarrott, 2020, Jarrott, 2011, Pettigrew et al, 1995, Savelkoul et al., Tripp et al., 1995, and Turner & Cameron, 2016). This developing area of study provides support to extend the use of the theory as a theoretical framework for establishing a change initiative that addresses the complex intersectionality of generational and disciplinary cohorts within the collegiate setting.

Working with administration, the trustees could establish multigenerational, multidisciplinary teams (students, faculty, staff, administrators, and trustees) to meet regularly across the academic year to address adaptive challenges facing the college, with particular focus on the area of the trustees' fiduciary responsibilities. For example, a working group might address the critical nature of student housing and its influence on student recruitment and retention, while another team might address the challenges facing the upcoming comprehensive campaign. The idea is to integrate trustee learning and relationship building within the context of fiduciary challenges. For example, the challenges of student housing project fits within the capital assets fiduciary responsibility and is a challenge experienced across the community, such that both students and faculty could help trustees make sense of their responsibilities.

These multigenerational, multidisciplinary working groups would be established by the trustees in partnership with administration on an annual basis while accounting for the diversity of the campus community. Participants would receive an orientation to community norms and practices while senior leaders ensure sufficient resources and support are available to complete

the experience. The team would then meet regularly to address the assigned learning objective in a collaborative environment.

This approach to active learning creates the cooperation necessary for building relationships of trust by sharing knowledge, reducing anxiety, and developing empathy for other generational and disciplinary cohorts. At the same time, the trustees are engaged in a more intentional form of support where they have the opportunity to gain an in-depth understanding of the way the college functions and the way trustee responsibilities intersect with the wider community. This approach to ongoing support would provide meaningful experiences that trustees could use in fulfilling their responsibilities.

Conclusion

This study was designed in partnership with Martin Methodist College to examine the experience of their trustees in response to Martin's desire to improve said experience. Combining the use of surveys and interviews provided a rich understanding of how members experience their roles and ways in which they see the potential for improvement. More importantly, this process helped to see the work of Martin trustees through the lens of sensemaking. From this vantage point, the findings identified the shared importance of both technical knowledge (fiduciary responsibilities) and the value of meaningful relationships within the context of leadership. At the same time, it became clear that these practices are not inherent within the body of the trustees and so require both onboarding and ongoing support.

The findings revealed certain important facets of the trustee experience at Martin. First, as it is today, there is no intentional methodological approach to onboarding or ongoing support of trustees. The lack of formalized support creates a scenario by which some members feel

disconnected and underprepared, leading to division and disenchantment, and trustees expressed a desire for learning opportunities that focus on the core responsibilities and structures of trusteeship at Martin. Second, the trustees clearly value the formation of meaningful relationships with the campus community and see those relationships as important in understanding their responsibilities. Specifically, the findings point to a shared desire among trustees to increase both the number and depth of opportunities for developing relationships with students and faculty.

The recommendations are based on this shared interest in traditional support opportunities (onboarding, retreats, etc.) and a desire for new ways to more naturally connect with and understand community partners, such as faculty and students. This combined approach supports trustees as they are called upon to make sense of complex, novel, and important duties by providing the systems, frameworks, and responsibilities together with a substantive, ongoing means to build relationships within the community.

Looking forward, this study offers an opportunity to consider ways to evolve traditional trustee support programs by fundamentally understanding the work of trustees as that of sensemaking. In so doing, colleges must consider the inherent importance of the role that relationships play in trustees' ability to make sense of their work. Additionally, the use of multigenerational, multidisciplinary learning groups provides a novel approach to ongoing support that includes opportunities for both traditional technical learning (fiduciary responsibilities) and relationship-centered learning.

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Appendix A

Trustee Survey

Trusteeship Survey

You are invited to participate in a web-based online survey on Trusteeship. This is a research project being conducted by Michael McCord, a doctoral candidate at Vanderbilt University. It should take approximately 10-12 minutes to complete.

PARTICIPATION Your participation in this survey is voluntary. You may refuse to take part in the research or exit the survey at any time without penalty. You are free to decline to answer any particular question you do not wish to answer for any reason.

BENEFITS You will receive no direct benefits from participating in this research study. However, your responses may help us learn more about how trustees understand and are prepared for their role.

RISKS There are no foreseeable risks involved in participating in this study other than those encountered in day-to-day life.

CONFIDENTIALITY Your survey answers will be sent to a link at www.redcap.vanderbilt.edu, where data will be stored in a multi-factor, password-protected electronic format. Redcap does not collect identifying information such as your name, email address, or IP address. Therefore, your responses will remain anonymous. No one will be able to identify you or your answers, and no one will know whether or not you participated in the study.

At the end of the survey, you will be asked if you are interested in participating in an additional interview using Zoom online video conferencing software. If you choose to provide contact information such as your phone number or email address, your survey responses may no longer be anonymous to the researcher. However, no names or identifying information would be included in any publications or presentations based on these data, and your responses to this survey will remain confidential.

CONTACT If you have questions at any time about the study or the procedures, you may contact me, Michael McCord, via email at michael.d.mccord@vanderbilt.edu OR you may contact my research supervisor, Professor Michael Neel, via email at michael.a.neel@vanderbilt.edu.

If you feel you have not been treated according to the descriptions in this form, or that your rights as a participant in research have not been honored during the course of this project, or you have any questions, concerns, or complaints that you wish to address to someone other than the investigator, you may contact the Vanderbilt University Institutional Review Board at 1313 21st Ave S, Suite 505 Nashville, TN 37232-4315 or (615) 322-2918.

ELECTRONIC CONSENT: Please select your choice below.
You may print a copy of this consent form for your records. Clicking on the "Agree" button indicates that

- Agree
 Disagree

- You have read the above information
- You voluntarily agree to participate
- You are 18 years of age or older

Section 1: Demographic Information

What is your gender identity?

- Female
- Male
- Prefer Not to Answer
- Other

Please describe "other"

Are you a student trustee?

- Yes
- No

What is your age?

- 18-23
- 24-39
- 40-55
- 56-74
- 75+

What is your ethnicity?

- White
- Hispanic
- Black or African American
- Native American or American Indian Asian / Pacific Islander
- Other
- Prefer Not to Answer

Please describe "Other."

For how many years have you served as a trustee in higher education?

- 10+ years
- 7-9 years
- 4-6 years
- 1-3 years
- Less than 1 year

What is the highest degree or level of school you have completed (if currently enrolled, highest degree received)?

- Some high school, no diploma
- High school graduate, diploma or the equivalent (GED)
- Vocational Training/Trade Certification
- Associate's degree
- Bachelor's degree
- Master's degree
- Doctorate/Terminal degree

What is your current employment status?

- Employed for wages
- Retired
- Out of Work/Unable to work A homemaker
- A student
- Military

What category below best represents your professional training/career?

- Education. (Includes: officer, administrator, or faculty member of a college, university or higher-education organization; teacher/administrator of a primary/secondary school; and others.)
- Business. (Includes: executive, administrator, or employee of: a large business corporation; a banking, financial, insurance, or real estate/property management company; a small business; and others.)
- Professional Service. (Includes: accountant; attorney/law; construction/trades; dentist, physician/medical professional; psychologist/mental health professional/social worker; and others.)
- Other

Please describe "Other."

Section 2: Fiduciary Data

Among a College trustee's chief fiduciary responsibilities are (1) oversight of capital assets, (2) oversight of financial assets, (3) oversight of human resources, (4) oversight of organizational reputation, and (5) advancing the mission of the organization. Drawing from your own experience, please answer the questions that follow regarding the five chief fiduciary responsibilities:

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
My fiduciary responsibilities as a trustee require information beyond my normal skillsets.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My fiduciary responsibilities as a trustee are challenging.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Fiduciary Responsibility: Oversight of Capital Assets

Assets with a useful life longer than a year that is not intended for sale in the regular course of the college's operation.

In comparison to my other responsibilities as a trustee, I view my role in the oversight of my institutions capital assets is...

- Extremely Important
- Very Important
- Moderately Important
- Slightly Important
- Not at All Important

As a member of the Board, I am called upon to take specific actions to oversee my institution's capital assets...

- Routinely
- Often
- Sometimes
- Rarely
- Never

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
My professional competencies prepared me to oversee my institution's capital assets.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
As a member of the board, my experience(s) overseeing my institution's capital assets has been satisfying.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Fiduciary Responsibility: Oversight of Financial Assets

In comparison to my other responsibilities as a trustee, I view my role in the oversight of my institution's financial assets is...

- Extremely Important
- Very Important
- Moderately Important
- Slightly Important
- Not at All Important

As a member of the Board, I am called upon to take specific actions to oversee my institution's financial assets...

- Routinely
- Often
- Sometimes
- Rarely
- Never

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
My professional competencies prepared me to oversee my institution's financial assets.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
As a member of the board, my experience(s) overseeing my institution's financial assets has been satisfying.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Fiduciary Responsibility: Oversight of Human Resources

In comparison to my other responsibilities as a trustee, I view my role in the oversight of my institution's human resources is...

- Extremely Important
- Very Important
- Moderately Important
- Slightly Important
- Not at All Important

As a member of the Board, I am called upon to take specific actions to oversee my institution's human resources...

- Routinely
- Often
- Sometimes
- Rarely
- Never

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
My professional competencies prepared me to oversee my institution's human resources.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
As a member of the board, my experience(s) overseeing my institution's human resources has been satisfying.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Fiduciary Responsibility: Oversight of Organizational Reputation

In comparison to my other responsibilities as a trustee, I view my role in the oversight of my institution's reputation is...

- Extremely Important
- Very Important
- Moderately Important
- Slightly Important
- Not at All Important

As a member of the Board, I am called upon to take specific actions to oversee my institution's reputation...

- Routinely
- Often
- Sometimes
- Rarely
- Never

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
My professional competencies prepared me to oversee my institution's reputation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
As a member of the board, my experience(s) overseeing my institution's reputation has been satisfying.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Fiduciary Responsibility: Advancing the Mission of the Organization

In comparison to my other responsibilities as a trustee, I view my role in advancing my institution's mission is...

- Extremely Important
- Very Important
- Moderately Important
- Slightly Important
- Not at All Important

As a member of the Board, I am called upon to take specific actions to advance the mission of my institution ...

- Routinely
- Often
- Sometimes
- Rarely
- Never

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
My professional competencies prepared me to advance the mission of my institution.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
As a member of the board, my experience(s) advancing the mission of my institution has been satisfying.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section 3: The utility of Trustees' Professional Orientations/Competencies

An individual's professional orientations/competencies are derived from their employment experiences. Professional orientation/competency includes the authority and influence a person cultivates from these experiences and the extent to which they see themselves as knowledgeable, a good judge of outcomes, respected, and referred to for expertise on certain matters.

Drawing from your own experience, please answer the questions that follow regarding your trusteeship:

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
My professional competencies are well known to my fellow trustees.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My professional competencies are well known to my institution's administration.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I prefer engaging in fiduciary responsibilities over which I have some professional competence.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The experience(s) I have had applying my professional competencies to my work as a trustee has been satisfying.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would welcome (additional) opportunities to apply my professional competencies to my work as a trustee.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

The utility of Trustees' Professional Orientations/Competencies, continued.

	Routinely	Often	Sometimes	Rarely	Never
As a member of the board, my fellow trustees defer (either in part or entirely) to me on fiduciary matters related to my professional competencies.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
As a member of the board, my professional competencies are effectively utilized by my institution's administration.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I seek opportunities to apply my professional competencies to my work as a trustee.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am provided opportunities to apply my professional competencies to my work as a trustee.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Onboarding Experience: The college provides an onboarding experience that adequately prepares me for my fiduciary role as a trustee.

I participated in an onboarding training experience when I joined the board. Yes No

Onboarding Experience: The college provides an onboarding experience that adequately prepares me for my fiduciary role as a trustee.

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
Oversight of Capital Assets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Oversight of Financial Assets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Oversight of Human Resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Oversight of Organizational Reputation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Oversight of Mission of the Organization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meaningfully connected me to faculty and staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meaningfully connected me with students	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Ongoing Training Experiences: The college provides ongoing training experiences that adequately prepare me for my fiduciary role as a trustee.

Training in this sense may include events or experiences that provide continuing education opportunities that support your role as trustee.

I have participated in ongoing training experiences beyond the onboarding. Yes
 No

Ongoing Training Experiences: The college provides ongoing training experiences that adequately prepare me for my fiduciary role as a trustee.

Training in this sense may include events or experiences that provide continuing education opportunities that support your role as trustee.

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	Disagree
Oversight of Capital Assets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Oversight of Financial Assets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Oversight of Human Resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Oversight of Organizational Reputation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Oversight of Mission of the Organization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meaningfully connected me with faculty and staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meaningfully connected me with students	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section 4: Additional questions about responsibilities as a trustee.

Colleges serve a diverse group of constituents (e.g. future students, current students, and faculty/staff).

Drawing from your own experience, please answer the questions that follow regarding your trusteeship:

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
It is important for trustees to understand the needs of future college (15-18-year-old) students.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
As a trustee, I have a working knowledge of the needs of future college students.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would like more opportunities to learn about future college students.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
It is important for trustees to understand the needs of current college (18-22-year old) students.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
As a trustee, I have a working knowledge of the needs of current college students.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trustees should have meaningful interactions with current college students.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The college provides opportunities to have meaningful interactions between trustees and current college students.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trustees should have meaningful interactions with faculty and staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
As a trustee, I have a working knowledge of the needs of faculty and staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trustees should have meaningful interactions with faculty and staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The college provides opportunities to have meaningful interactions between trustees and current faculty and staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section 4: Open-Ended Questions

The next three questions are open-ended and optional. Your written responses are appreciated.

How could the Board better use your professional knowledge or experiences? Please explain.

How could the Board provide training experiences that strengthen the skills necessary for trusteeship? Please explain.

How could the Board strengthen your understanding of and/or interactions with future students and/or current students? Please explain.

How could the Board strengthen your understanding of and/or interactions with faculty and/or staff? Please explain.

Is there anything else related to your experience as a trustee and/or a professional that you would like to share with the researcher? Please explain.

Section 5: Closing Questions

In an effort to better understand the trustee experience, some participants may be asked to participate in a follow-up, web-based interview.

I am open to participating in Phase II of this study and may be contacted for a private 1:1 interview. I understand that my name and institution will not be revealed in any data that is collected or published.

- Yes
 No

Name

Email

Phone Number

Appendix B

Interview Protocol

Trusteeship at Martin Methodist

Introductory Protocol

You have been selected to speak with me today because you are a trustee at Martin Methodist College, and you have volunteered to speak with me about your experiences with trusteeship at Martin. This research project is focused on improving the experience and meaningfulness of trusteeship at Martin. The study does not aim to evaluate your techniques or experiences. Rather, we are trying to learn more about how people experience serving as a trustee and to find ways to strengthen that experience.

To facilitate our note taking, I would like to video record our conversations today. Only researchers on the project will be privy to the recordings which will be eventually destroyed after they are transcribed. Before continuing, please consider the following: (1) all information will be held confidential, (2) your participation is voluntary and you may stop at any time if you feel uncomfortable, and (3) we do not intend to inflict any harm. Thank you for your agreeing to participate.

We have planned this interview to last no longer than one hour. During this time, we have several questions that we would like to cover. If time begins to run short, it may be necessary to interrupt you in order to push ahead and complete this line of questioning.

Introduction

Do you have any questions about this project or how the data will be used?

Given the information provided, are you comfortable proceeding with the interview?

A. Interviewee Background

1. How long have you been...

- a. _____ a trustee?
- b. _____ at this institution?

a. Interesting background information on interviewee:

- b. What is your highest degree? _____
- c. What is your field of study? _____

a. Briefly describe your role (office, committee, etc.) as it relates to serving on the Board of Trustees at Martin (if appropriate). Academic Affairs, chair 6 years, Risk and Audit 4 years.

a. How did you first get connected to Martin? Former chair recruiter. While in corporate.

- b. As a trustee?
- c. How did you get invited to join?

a. What do you find as most rewarding about your experience? Nature of students and community

a. Most challenging?

B. Institutional Perspective

a. Before joining the board, what was your perspective of the college?

a. Before joining the board, what was your perspective of the trustees?

a. How, if at all, have those views changed?

As a researcher, I am particularly interested in how trustees are prepared for their work. The next series of questions will focus on how you experienced onboarding and/or ongoing training. For the sake of these questions, onboarding training is considered training and/or orientation that occurs within the first six months of your election to the Board. Ongoing training is considered training all trustees over the course of their terms of service.

C. Onboarding

a.

a. When you joined, did you receive any orientation, onboarding, or training?

- b.If no, do you think training/onboarding would have improved your experience?
 - i.What areas of training would have been most helpful?
- a.If yes, do you feel the onboarding was helpful?
 - i.Could you describe the experience?
 - ii.How could it have been improved?
 - iii.Are there topics you wish were included during this training?

i.

D. Ongoing Training

i.During your term, have you experienced opportunities for ongoing training that supported your role as a trustee?

- a.If no, do you think ongoing training would have improved your experience?
 - i.What areas of training would be most helpful to you as a trustee?

- a.If yes, do you feel the onboarding was helpful?
 - i.Could you describe the experience?
 - ii.How could it have been improved?
 - iii.Are there topics you wish were included during this training?

iv.Do you think ongoing training is an important experience for trustees? Why or why not?

Trustees play an important role within the life of the college and yet may not spend a lot of time on campus. The next few questions are focused on how you have experienced being part of and in relationship with the community including: faculty and students.

E. Multi-generational Relationships

- i.Do you feel like you've had opportunities to interact with faculty in a way that helps your role as a trustee? Describe?
- ii.Are there ways you think the board could be more connected with the faculty?
- iii.Do you feel like you've had opportunities to interact with students in a way that helps your role as a trustee? Describe?
- iv.Are there ways you think the board could be more connected with students?

My area of study is focused on the idea of continuous improvement. That is to say, we are constantly looking at systems and organizations with an eye towards efficiency, effectiveness, and/or meaningfulness. I would like to close our interview thinking in terms improvement.

F. Improvement

- i.Thinking about your time as a trustee, what's one thing the leadership could do that would improve the trustees. (Experience, effectiveness, and/or meaningfulness)

- ii. When I am thinking about developing an improvement plan, what's one thing I should really know about the trustees or Martin?
- iii. What obstacles are likely to come up when working to improve the work of the trustees?

G. Final Question

- i. What question did I not ask that I should have?