JULY 16, 2024

BOARD OF TRUSTEE SELF-EVALUATION REPORT

SAN JOAQUIN DELTA COMMUNITY COLLEGE DISTRICT

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Executive Summary

The San Joaquin Delta Community College District Board of Trustees (Board) adheres to a process of continual self-improvement in support of the Delta College mission. The following Board Self-Evaluation Report conveys this commitment in that it describes the Board's current self-evaluation process, summarizes recent evaluation results, and details the five goals it established for the 2024-25 year to support progress on the achievement of District priorities and improve its effectiveness and performance as a Board of Trustees.

Board Goals for 2024-25

- 1. Expect and continue to monitor progress on establishing and assessing student access, success, and support, particularly for disproportionately impacted student populations.
 - i. Receive, review, and discuss a progress report on the implementation of *Mustangs Moving Forward* by the end of Fall 2024.
 - ii. Receive, review, and discuss metrics of student access, success, and support, particularly focused on disproportionately impacted student populations by the end of Fall 2024.
 - iii. Receive, review, and discuss the 2023-24 faculty and staff annual hiring report by the end of Fall 2024.
 - iv. Receive, review, and discuss reports on progress associated with adult education apprenticeship pathways and dual enrollment by the end of Fall 2024.
 - v. Receive, review, and discuss reports on the alignment between regional workforce needs, and college programs and student achievement by the end of Fall 2024.
 - vi. Support trustee education on best-practice models for the provision of community college student housing by the end of Spring 2025.

2. Ensure the fiscal health and accountability of the District.

- i. Approve and actively support the pursuit of a general obligation bond.
- ii. Direct the CEO to develop and incorporate evaluation/prioritization criteria into long-range planning and capital investment processes (e.g., master planning).
- iii. Support trustee education on understanding District budget processes and budgets, financial statements, and annual audit reports.
- iv. Ensure the proposed annual budget reflects the District' priorities (i.e., strategic goals).
- v. Review and approve the Annual Budget.
- 3. Engage organizations, employers, underrepresented communities, and other College stakeholders within trustees' respective service areas to identify community needs, trends, and partnership opportunities; and convey the District's ongoing commitment and contributions to the community.
 - i. Participate in a Board training on effective community engagement.
 - ii. Participate in joint meetings with school district Boards and other critical community stakeholders.
 - iii. Conduct at least one regular Board meeting in a Northern, Southern and Eastern location within the District during the 2024-25 academic year.

4. Expect and monitor progress on strengthening organizational effectiveness and campus climate.

- i. Review and approve updated educational, facilities and technology master plans in Fall 2024 that address the relationship to student success by incorporating student/learner-centered design principles into each plan.
- ii. Review and discuss reports on key organizational processes, including professional development and governance/decision-making.
- iii. Approve and update Board Policies and related Administrative Procedures by the end of the Fall 2024 semester.
- iv. Receive and review reports on campus climate, particularly as it relates to the conditions that impact the student experience and learning environment.
- v. Support trustee education on understanding community college best-practices in environmental sustainability.

5. Continue to strengthen Board accountability and relations, including communication amongst trustees, between the Board and CEO, and with constituency groups.

- i. Adopt and actively pursue the achievement of annual Board goals and action steps.
- ii. Participate in a mid-year Board retreat, in part to evaluate progress on annual Board goals.
- iii. Ensure each trustee receives the orientation, education, and/or support to serve effectively as a member of a high-functioning Board.
- iv. Request constituency leaders include information pertaining to their group's priorities as part of their regular Board reports.

Introduction

The Board strives for excellence in serving the residents of the San Joaquin Delta Community College District (District) and is committed to continually improving its performance and effectiveness toward this end. As part of this commitment, the Board conducts a regular cycle of self-evaluation as outlined in Board Policy (BP) 2745, focused specifically on improving its effectiveness related to the duties and responsibilities as described in BP 2200. This annual evaluation allows the Board to identify and better understand areas of strength, identify opportunities for growth, and establish a self-improvement plan—a set of goals and associated action steps intended to enhance its effectiveness in supporting District priorities and its own performance. The report herein describes the Board's evaluation process, summarizes evaluation results, and identifies via a set of goals and action steps, how the board intends to focus its efforts over the coming year to perform its duties and responsibilities most effectively as a Board of Trustees.

Board of Trustees Annual Cycle of Self-Evaluation: Summary of Process & Progress

The Board of Trustees Annual of Cycle of Self-Evaluation (BOT-ACSE) begins in January, with the appointment of a Board committee charged with recommending improvements to the self-evaluation process and the instrument for

gathering information (e.g., surveys, interviews, and/or informal inquiry) as part of the upcoming evaluation process.

<u>Progress:</u> On March 19, 2024, the Board of Trustees took <u>action</u> to approve both the evaluation instrument (i.e., survey) and a process of annual self-evaluation and goal setting (See Appendix A).

Assessment: The first step in the BOT-ACSE involves assessing the Board's performance relative to characteristics of effective Board practice described in BP 2200 as well as similar criteria established by recognized practitioners in the field.

<u>Progress:</u> A survey evaluating the Board's performance was administered in early April of 2024. Survey participants included the members of the Board and College constituencies via their leadership. Survey results were <u>presented</u> to the Board on April 16th, 2024 by the survey consultants, PPL, Inc. (See Appendix B).

Evaluation & Goal Setting: The second step in the BOT-ACSE represents the evaluation of Board performance/effectiveness utilizing the results of the recent survey as well as additional input from Board members. It is here the Board celebrates areas of strength and explores opportunities for improvement/growth. Based on these insights, the Board identifies potential goals and associated action steps for the upcoming year aimed at improving its collective performance, supporting the achievement of institutional priorities, and responding to any current/upcoming unique situations (e.g., accreditation self-study, bond election).

<u>Progress</u>: On April 20, 2024, the Board participated in an all-day <u>retreat</u> facilitated by an outside consultant wherein trustees reviewed and discussed progress on institutional priorities and the results of the recent Board evaluation survey. Evident in the Board's dialogue was a sense of optimism about its overall development and direction as well as a commitment to further improve its effectiveness as a governing body over the coming year.

Several themes emerged from the Board's dialogue during the retreat that reinforced this commitment and translated well into a set of five goals and associated action steps for the upcoming year.

Theme 1 - Student-Centered: The Board remains deeply committed to ensuring student access and success, with a particular emphasis on underrepresented and disproportionately impacted student populations, and it intends to ensure and monitor institutional progress toward this end. The Board is equally committed to ensuring College programs align with emerging and future regional workforce needs, and that all students receive the necessary support and successfully navigate their program pathways in a timely manner.

Board Goal 1: Expect and continue to monitor progress on establishing and assessing student access, success, and support, particularly for disproportionately impacted student populations. (SJDC Strategic Goal 1; Vision 3030 Goal 1, 2, & 3)

- i. Receive, review, and discuss a progress report on the implementation of *Mustangs Moving Forward* by the end of Fall 2024.
- ii. Receive, review, and discuss metrics of student access, success, and support, particularly focused on disproportionately impacted student populations by the end of Fall 2024.
- iii. Receive, review, and discuss the 2023-24 annual hiring report of faculty and staff by the end of Fall 2024.
- iv. Receive, review, and discuss reports on progress associated with adult education apprenticeship pathways and dual enrollment by the end of Fall 2024.
- v. Receive, review, and discuss reports on the alignment between regional workforce needs, and college programs and student achievement by the end of Fall 2024.
- v. Support trustee education on best-practice models for the provision of community college student housing by the end of Spring 2025.

Theme 2 - Fiduciary Responsibility: The Board recognizes its primary role and responsibility for ensuring the long-term fiscal health and stability of the District. It conveyed a strong interest in ensuring all capital investment decisions fully consider their long-term costs and benefits. The Board expressed an interest in receiving more information and having more dialogue regarding district fiscal planning/reporting (i.e., annual budgets, audit reports) and as such, recognized a need for further Board development in this area.

Board Goal 2: Ensure the fiscal health, stability, and accountability of the District.

(SJDC Strategic Goal 1, 2, & 3; Vision 3030 Goal 1, 2, & 3)

- i. Approve and actively support the pursuit of a general obligation bond.
- ii. Direct the CEO to develop and incorporate evaluation/prioritization criteria into long-range planning and capital investment processes (e.g., master planning).
- iii. Support trustee education on understanding District budget processes and budgets, financial statements, and annual audit reports.
- iv. Ensure the proposed annual budget reflects the District' priorities (i.e., strategic goals).
- v. Review and approve the Annual Budget.

Theme 3: - Community Engagement: The Board recognizes a need to actively engage with their respective communities to strengthen relationships, identify unmet and emerging community needs, foster partnership opportunities, and convey the District's strong commitment and ongoing contributions to these communities. The Board further recognizes that to effectively achieve these desired ends requires additional capacity building—training and development that will lead to more strategic, consistent, and productive community engagement.

Board Goal 3: Engage organizations, employers, underrepresented communities, and other College stakeholders within trustees' respective service areas to identify community needs, trends, and partnership opportunities; and convey the District's ongoing commitment and contributions to the community. (SJDC Strategic Goal 3; Vision 3030 Goal 1, 2, & 3)

- i. Participate in a Board training on effective community engagement.
- ii. Participate in joint meetings with school district Boards and other critical community stakeholders.
- iii. Conduct at least one regular Board meeting in a Northern, Southern and Eastern location within the District during the 2024-25 academic year.

Theme 4: - Organizational Effectiveness: The Board conveyed a strong interest in ensuring the District maintains a modern, efficient, and reliable infrastructure (buildings & grounds, information technology, etc.) and operational systems (institutional planning, governance, professional development/training, etc.) that responds to current and future needs, supports a positive campus climate, and encourages deeper community-campus(es) connections.

Board Goal 4: Expect and monitor progress on strengthening organizational effectiveness and campus climate. (SJDC Strategic Goal 2; Vision 3030 Goal 1, 2, & 3)

- i. Review and approve updated educational, facilities and technology master plans in Fall 2024 that address the relationship to student success by incorporating student/learner-centered design principles into each plan.
- ii. Review and discuss reports on key organizational processes, including professional development and governance/decision-making.
- iii. Approve and update Board Policies and related Administrative Procedures by the end of the Fall 2024 semester.
- iv. Receive and review reports on campus climate, particularly as it relates to the conditions that impact the student experience and learning environment.
- v. Support trustee education on understanding community college best-practices in environmental sustainability.

Theme 5: - Strengthening Accountability & Relationships: The Board conveyed a desire to maintain an intentional focus on its performance and effectiveness, recognizing that establishing clear priorities and holding itself accountable serves to convey similar expectations of the District. The Board also understands the importance of continuing to strengthen its working relationships amongst members, and that clear, consistent communication from the Board assists the CEO and other constituencies in understanding and responding effectively to the Board's priorities and directions.

Board Goal 5: Continue to strengthen Board accountability and relations, including communication amongst trustees, between the Board and CEO, and with constituency groups.

(SJDC Strategic Goal 1, 2, & 3; Vision 3030 Goal 1, 2, & 3)

- i. Adopt and actively pursue the achievement of annual Board goals and action steps.
- ii. Participate in a mid-year Board retreat, in part to evaluate progress on achieving annual Board goals.
- iii. Ensure each trustee receives the orientation, education, and/or support to serve effectively as a member of a high-functioning Board.
- iv. Request constituency leaders include information pertaining to their group's priorities as part of their regular Board reports.

Collectively, these five goals and their related actions steps reflect the most important priorities of the Board, and as such, point to where it will invest its available time and effort over the coming year.

Progress Monitoring: Throughout the upcoming year the Board will regularly monitor its progress in achieving its adopted goals as well as add and/or modify these goals to better meet their needs as conditions warrant. To ensure follow-through and assist with monitoring progress, when practical, the action steps associated with achieving each of the five goals will be listed in the board calendar. This provides the CEO and her staff with appropriate time to make the necessary preparations (e.g., identify/secure training providers, organize requested data, develop presentations and reports). Additionally, in December 2024, the board will participate in a mid-year retreat, in part to specifically assess progress in achieving its stated goals for the current year.

Conclusion

The Board has and continues to be actively engaged in a process of continual self-improvement. To date, it has established a clear cycle of self-evaluation, assessed, and evaluated its past performance. This evaluation report summarizes these efforts as well as describes the goals and action steps the Board derived from these efforts. The work to-date clearly demonstrates that the Board is committed to self-improvement and recognizes its effectiveness sets the overall tone for, and in many ways, serves as the rate determining step to institutional progress in fulfilling the Delta College mission.

Appendix A: Evaluation Survey

San Joaquin Delta Community College District Board of Trustees Self-Evaluation Spring 2024

This survey is designed to allow each of you an opportunity to assess your individual performance as a board member of the San Joaquin Delta Community College District as well as provide your perceptions of the effectiveness of the Board as a whole in serving its constituencies and the community.

Items 1-11 are designed to assess your individual performance as a board member.

Items 12-19 are designed to assess the performance of the Board as a whole.

Return the completed evaluation to Jim <u>iriggs@pplpros.com</u> by <u>April 8, 2024</u>. Please contact Jim Riggs at 209-559-6550 if you have questions about the Board of Trustees self-evaluation.

Please use the below rating criteria in responding to the survey questions.

Rating Criteria:

- 5 Outstanding progress or performance
- 4 Good progress or performance
- 3 Performance met acceptable standard
- 2 -Poor progress or performance
- 1 -No progress or performance N/A Unable to evaluate

Assessment of Your Individual Performance as a Board Member (Items 1-11)		
1. How do you rate your individual performance in making enough time for board duties?		
2. How do you rate your individual performance in reaching out to the CEO (e.g., calling, meeting, emailing, etc.) prior to a board meeting with questions about the meeting agenda or materials?		
3. How do you rate your individual performance in participating in campus events?		
4. How do you rate your Individual performance in representing the District at community events?		
5. How do you rate your individual performance in your commitment to Trustee education?		
6. How do you rate your individual performance in establishing and/or enhancing an effective working relationship with the District's CEO?		

7. How do you rate your individual performance in awareness of the District's Code of Ethics and Conflict of Interest regulations?	
8. How do you rate your individual performance in understanding Guided Pathways?	
9. How do you rate your individual performance in knowledge of the District Student Success Metrics?	
10. How do you rate your individual performance in knowing the proper way to refer comments/complaints from constituents to the CEO or the Board as a whole?	
11. How do you rate your individual performance in understanding the Brown Act?	
Your Assessment of the Board's Performance as a Whole (Items 12-19)	
12. How do you rate the Board's performance in understanding the current Student-Centered Funding Formula?	
13. How do you rate the Board's performance in working with the CEO to guide the District through adapting to-the new Post-Pandemic Normal?	

- 14. How do you rate the Board's performance in working collaboratively to develop and further the Board's goals?
- 15. How do you rate the performance of the Executive Team in serving as the voice of the whole Board in interactions with the CEO and conveying the whole Board's positions and developing Board meeting agendas?
- 16. How do you rate the Board's performance in understanding the priorities of the various college constituencies.
- 17. How do you rate the Board's performance relative to Trustees being appropriately engaged in the community and regularly representing the College in meetings, fund raising activities, conferences, etc.?
- 18. How do you rate the Board's performance relative to how the community perceives the effectiveness and professionalism of the Board, as a whole?
- 19. How do you rate the Board's performance in supporting current major initiatives at Delta College including but not limited to Guided Pathways, AB 705/1705 and DEI?

Please provide any suggestions as to how the Board of Trustees might improve its effectiveness as well as any additional comments you would like to share regarding the Board's overall performance?

Enter your comments here:

Appendix B: Results of Evaluation Survey

	2024	2021	Difference
 How do you rate your individual performance in making enough time for board duties? 	4.5	3.86	0.64
2. How do you rate your individual performance in reaching out to the CEO (e.g., calling, meeting, emailing) prior to a board meeting with questions about the meeting agenda or materials?	4.67	3.43	1.24
How do you rate your individual performance in participating in campus events	3.8	3.67	0.13
4. How do you rate your individual performance in representing the District at community events?	3.60	3.33	0.27
5. How do you rate your individual performance in your commitment to Trustee education?	4.33	4.0	0.33
6. How do you rate your individual performance in establishing and/or enhancing an effective working relationship with the District's CEO?	4.67	3.71	0.96
7. How do you rate your individual performance in awareness of the District's Code of Ethics and Conflict of Interest regulations?	4.83	3.71	1.12
8. How do you rate your individual performance in understanding Guided Pathways?	4.17	3.86	0.31
How do you rate your individual performance in knowledge of the District Student Success Metrics?	4.17	3.43	0.74
10. How do you rate your individual performance in knowing the proper way to refer comments/complaints from constituents to the CEO or the Board as a whole?	4.67	3.86	0.81

11. How do you rate your individual performance in understanding the Brown Act?	4.83	4.14	0.69
12. How do you rate the Board's performance in understanding the current Student-Centered Funding Formula?	4.17	3.71	0.46
13. How do you rate the Board's performance in working with the CEO to guide the District through adapting to the new Post-Pandemic Normal?	4.2	3.29	0.91
14. How do you rate the Board's performance in working collaboratively to develop and further the Board's goals?	4.17	2.86	1.31
15. How do you rate the performance of the Board Executive Team in serving as the voice of the whole Board in interactions with the CEO and conveying the whole Board's positions and developing Board meeting agendas?	4.17	3.14	1.03
16. How do you rate the Board's performance in understanding the priorities of the various college constituencies.	3.43	3.43	0.0
17. How do you rate the Board's performance relative to Do Trustees being appropriately engaged in the community and regularly representing the College in meetings, fund raising activities, conferences, etc.?	3.8	2.83	0.97
18. How do you rate the Board's performance relative to how the community perceives the effectiveness and professionalism of the Board, as a whole?	3.6	3.00	0.60
19. How do you rate the Board's performance in supporting current major initiatives at Delta College including but not limited to Guide Pathways, AB 705/1705 and DEI?	4.67	NA	NA

Q20: Do you have any ideas on how the Board of Trustees might improve or any additional comments you would like to share regarding the Board's performance?

- Continue to support one another as comrades to keep consistency as a collective board to support the district's mission and vision, and help students succeed.
- · We will all need to step up our game this year to get the bond approved.
- The Brown Act really limits the ability of the Board Exe Committee to solicit thoughts and ideas and generally communicate with other trustees beyond agendized items in the public meeting. In my opinion it really hampers the ability of the board to work together in achieving common goals. I feel that the board is generally a cohesive unit that differs very little philosophically. We don't always agree on the best way to achieve goals, but our goals are generally very much in line.
- More participation at Events; Campus & Student events on campus; Community events. Overall, our board
 has come a long way in the past 16 months and we're working as a Team with goals, objectives and student
 successes. The majority of board members truly support each other and ENJOY our Trusteeship.
- In-person meetings; Team building activities; Outreach activities.

Constituent Group Leaders' Input Into the Board Evaluation

1. The Board of Trustees demonstrates a strong commitment to collegial consultation and participatory decision-making throughout the College District.

Over-all Rating: 3.13 (2021 Survey 3.18)

2. The Board of Trustees solicits and gives attention to perspectives and opinions of community members and community groups as well as individuals and constituent groups at the College.

Over-all Rating: 3.50 (2021 Survey 2.98)

- 3. The Board of Trustees seeks to provide a positive working climate throughout the College District. Overall Rating: 3.81 (2021 Survey 2.67)
- 4. The Board of Trustees works collegially with collective bargaining groups.

Overall Rating: 3.50 (2021 Survey 3.14)

5. The Board of Trustees understands the priorities of the various college constituent groups.

Overall Rating: 3.19 (2021 Survey 2.72)

6. The Board of Trustees supports diversity, equity and inclusion in all forms for students, employees and community.

Overall Rating: 3.81 (2021 Survey 3.23)

- 7. The Board of Trustees is committed to meeting the needs of historically underserved populations, minority communities and low-income students through college programs, services and outreach efforts.

 Over-all Rating: 3.75 (2021 Survey 2.91)
- 8. The Board of Trustees, through policy governance and working through the Superintendent/President, assures that all District operational areas are administered effectively and are appropriately integrated for the purposes of advancing student learning, reducing achievement gaps, improving student completion and addressing special needs of students.

Overall Rating: 3.06 (2021 Survey 2.69)

9. The Board of Trustees, through policy governance and working through the Superintendent/President, assures consistent and effective fiscal and physical resources oversight, budget efficiency, enrollment management, and strategic planning.

Overall Rating: 3.31 (2021 Survey 2.88)

10. The Board of Trustees, through policy governance and working through the Superintendent/President, assures that the College is effectively cultivating strategic partnerships with business and industry, non-profit organizations, government entities, and other educational institutions.

Overall Rating: 3.38 (2021 Survey 2.82)

Average Overall Rating of Each Constituent Group to the 10 Questions for the 2024 Survey

All Groups: 3.44 (2021 Survey 2.92)

• Students: 3.22

• Classified Professionals: 3.70

• Faculty: 3.00

• Administrators: 3.83

Constituent Group Leaders' Input Into the Board Evaluation

Ideas on how the Board of Trustees might improve or be more effective – A PARTIAL LIST

- Change the Board Evaluation to October so that it does not coincide with negotiations with the constituent groups.
- Clarify the Board's role in relationship to listening to constituent groups.
- More collegial approach in public meetings in their interactions with each other in public commentary.
- The Board needs to do a better job of communicating the needs of the Community.
- Engage more with students to better understand their needs.

Most important institutional issues that the Board of Trustees will need to address in the coming year (2024-2025) - A PARTIAL LIST

- Passing a Facilities Bond
- Fiscal Issues
- Improving and Updating IT and Physical Infrastructure
- Diversity in Faculty and Other Employee Groups
- Enrollment Management
- More Educational Pathways that Lead toward Livable Wage Jobs
- Improving Participatory Governance Structure
- Student Housing
- Better Defining and Maintaining the Division of Roles and Responsibilities
- Between the President and BoT