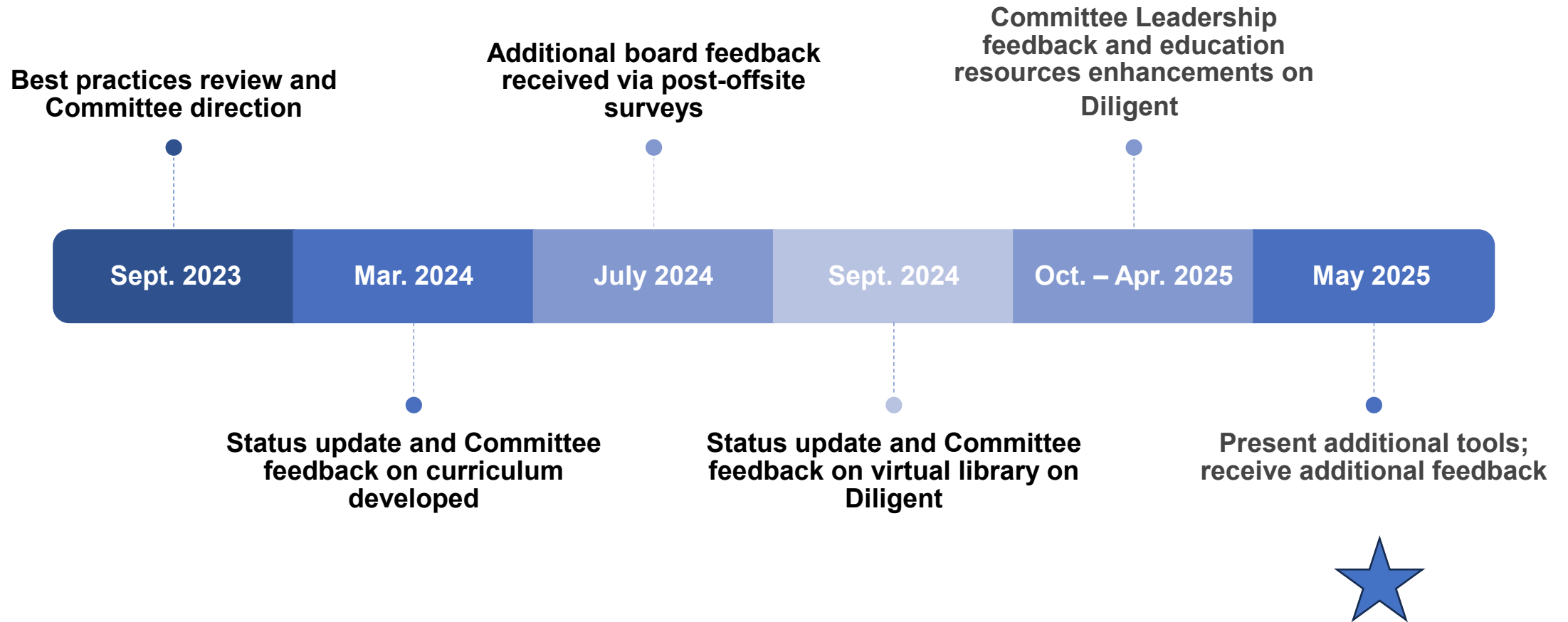


Board Continuing Education Program Update *(Information Item)*

A Presentation to the CalSTRS Board Governance Committee | May 8, 2025

Background



Enhance Education Tools and Communications



Suggested Improvement Initiatives

- Clarify and streamline “board education onboarding and beyond” pathway.
- Incorporate:
 - Mentorship.
 - Relationship-building.
 - Member content and interactions.
- Implement a follow-up routine.
- Enhance communication and visibility of internal and external education opportunities.
- Increase education policy familiarity.



Trustee Education Pathway: Onboarding and Beyond

Board Education Policy

Requirement: 24 hours of continuing education every two years.

New Trustee Onboarding (Year 1)

0-3-months				3 - 6-months			7-12-months		
Observe Board & committee meetings	Onboarding sessions w/CEO, Board Chair/Vice Chair, CIO, and staff	Pre-board meeting briefings with staff	Explore board education program and resources on Diligent; consider mentor	1:1s with board consultants and chairs of committees served	Meet with mentor, discuss experiences	6-month check-in with CEO & Board Chair	Meet with mentor, discuss experiences	Engage in education events (see below)	One-year onboarding check-in

Board Continuing Education Program (Year 2+)

Virtual Library of Education Resources on Diligent	Member and Employer Interactions	Internal Education Opportunities	Customize Your Education Path
<ul style="list-style-type: none"> • Core curriculum: Y1 • Fundamentals curriculum: Y1-Y3 • Strategic curriculum: Y3+ • Board Mentorship Program 	<ul style="list-style-type: none"> • CalSTRS member education videos on Diligent • Teachers' profile videos on CalSTRS website • Call /Service center visits and shadowing • Client and Employer Advisory Committee meetings 	<ul style="list-style-type: none"> • @Board and Committee meetings • Pre-meeting briefings and 1:1s w/staff • Pre-meeting briefings and 1:1s w/consultants, and other resources • Trading floor tours • Benefit Connect Demos 	<ul style="list-style-type: none"> • External education events listing (on-demand/self-paced, virtual, & in-person) • CalSTRS trustee education assessment form for external events • Annual Trustee education preferences survey • Post-meeting surveys

Please feel free to reach out to staff or Mosaic if you need any assistance or have questions regarding education activities or options.



Board Mentorship Program Resources

Board Mentorship Program: Overview



Purpose: The Board Mentoring Program is an opportunity for a new trustee to connect with a tenured trustee for their first one to two years of service to learn and be fluent in the CalSTRS board culture, norms, and dynamics. This program aims to foster a sense of belonging, build relationships among trustees, and enhance the value and satisfaction of board service.

Guiding Principles	What Success Looks Like
<ul style="list-style-type: none"> Participation is voluntary and flexible. Mentorship relationships are mentee-led and organically developed. Time commitment is modest but meaningful. Focus is on informal, trust-based conversations. All board members are encouraged to engage, either as mentors, mentees, or both. 	<ul style="list-style-type: none"> New trustees feel confident, connected, well-oriented, and welcomed. Mentors feel their experience is valued and are energized by their contribution. A culture of learning, support, and engagement is strengthened across the board.

Guidance and Information for Mentees

Mentee's Role: For onboarding and relationship building, new trustees ought to observe and interact with tenured trustees. If a new trustee is interested in a mentorship, they can identify the tenured trustees whose approach resonates with the mentee. Mentor preferences can be communicated to the board chair for coordination. Typically, this is done within the first 3 to 6 months of taking a board seat. It is the mentee's responsibility to schedule time with the mentor and ask questions.

How to Find a Mentor	Tips for Mentees
<ul style="list-style-type: none"> Observe who you connect with during meetings and social time. Reach out informally for a conversation. Ask the board chair or governance committee chair if you need help connecting. 	<ul style="list-style-type: none"> Know and comply with open meetings laws, including not discussing any items being brought before the board for action. Take initiative in scheduling time with your mentor (e.g., a 30-minute catchup over coffee, before or after meetings). Share what you hope to gain from mentorship. Come with questions or topics about which you are curious.

Guidance and Information for Mentors

Mentor's Role: The mentor's role is to support the new trustee and serve as their sounding board and informal guide.

Ways to Support Your Mentee	Tips for Mentors
<ul style="list-style-type: none"> Offer to review a meeting agenda together. Reflect on board discussion style and culture. Answer questions about processes, roles, and history. Share your experiences. 	<ul style="list-style-type: none"> Know and comply with open meetings laws, including not discussing any items being brought before the board for action. Be a listener as much as an advisor. Let the mentee set the pace and focus of your conversations.

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Board Mentorship Program: Overview



Bagley-Keene Open Meeting Act Guide for Trustees

Below is a link to a resource regarding Bagley-Keene Open Meeting Act.

[Bagley-Keene Open Meeting Act Guide 2024](#)

Suggested Check-In Points

Communication can be in person, via phone, or virtually.

Possible check-in points are listed below.

- Soon after establishing mentorship (ideally within first 6 months of term).
- Before and after each meeting or offsite for first year or so.
- A day outside of meeting schedule, if possible.

Examples of Questions From Mentee to Mentor

- What drew you to serve on the CalSTRS board?
- What surprised you the most in your first year?
- What helped you the most when you were new to the board?
- How do you prepare for board meetings?
- How do board members usually raise questions or concerns?
- How do board members bring up sensitive issues constructively?
- Are there any unspoken norms I should be aware of?
- What's been the most rewarding part of your board service?
- How can a new board member become more comfortable participating actively at the dais?

Examples of Questions From Mentor to Mentee

- What drew you to serve on the CalSTRS board?
- Have you served on other boards? How have those experiences been compared to CalSTRS?
- How was your onboarding and attendance at your first CalSTRS board/committee meetings?
- Which topics interest you the continuing education? Have you explored the external education opportunities catalogue? (Mention some high-value education events.)
- What would you like to gain from this mentorship?

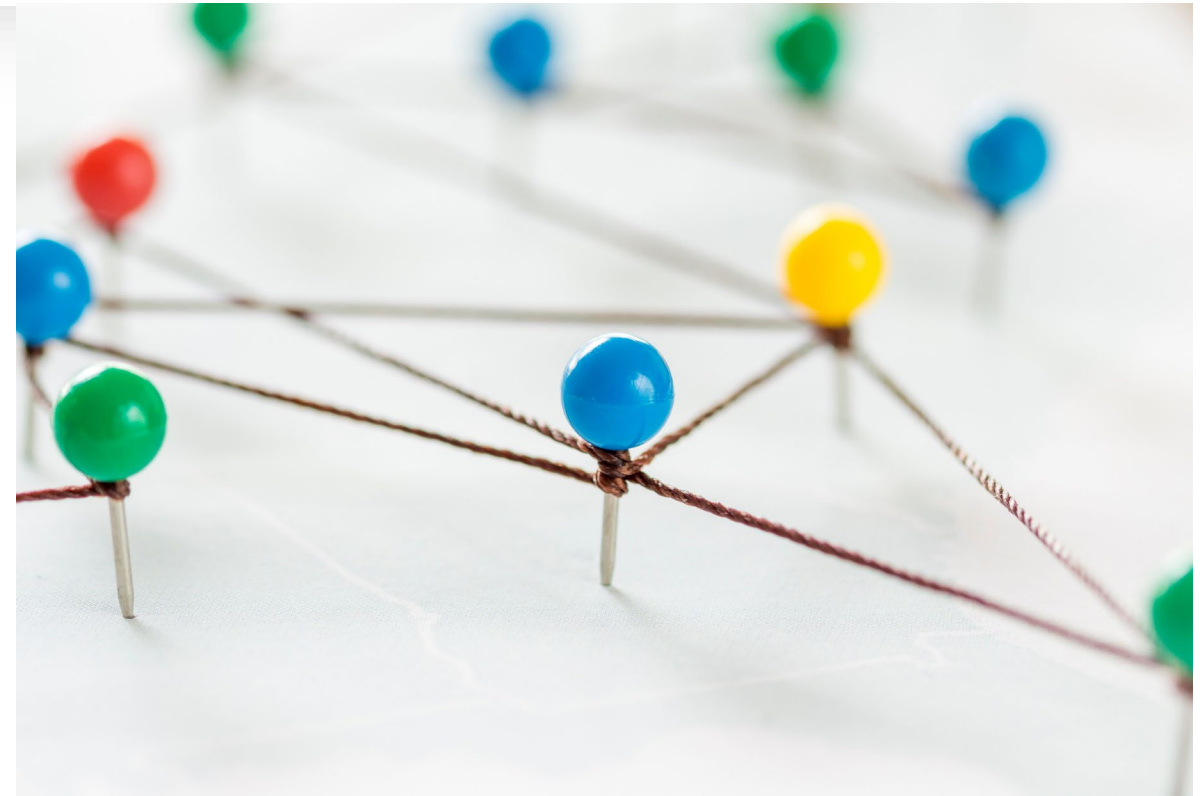
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Next Steps

- Integrate and operationalize new practices.
- Continue to enhance visibility of board education program among trustees.
- Continue to increase education policy familiarity.
- Finalize mentoring program framework.



Discussion



What is the Committee's feedback on the board education program enhancements?



Thank you for your time!

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