



Board Orientation

When our organization hires a new staff member, we do not simply show the person to her cubicle and expect results. Every new staff member needs an introduction to her surroundings, colleagues, organizational rules and regulations, and, naturally, what her job entails. The expectation is no different for board members. No one is born a perfect board member. Every new elected member of the board needs thorough orientation to his role and to the expectations that the board places upon him.

Vital elements

Any successful training requires structure, key individuals to carry out the process, and receptive trainees willing to assume their new roles. For board member orientation, these elements consist of the following:

- **Structure** — Timing, sessions, materials
- **Key individuals** — Governance committee, chair, chief executive, outside experts
- **Board members** — New recruits, present members

Structuring orientation

Board member orientation is never a one-time event. It starts during cultivation and continues after a new member's first board meeting. When recruiting candidates, you introduce the person to the organization, explain why you are interested in him, and discuss board service in general. After the recruit has accepted your invitation to join the board, you organize an orientation session that covers everything a new member needs to know about serving the organization.

Tool of the trade

Prepare a board book for every new board member. A permanent reference tool, it includes all the facts and documents that are important for board work. This manual can exist in an electronic format — simply save the materials on a CD — or, if you have the technological means, you can post them on an Intranet with priority access for board members. A board manual should include at least the following documents:

- **Know the people** — List of all board members, their terms, and their contact information; a short biography of the chief executive; an organizational chart
- **Know the responsibilities** — Description of board member responsibilities; job descriptions of the officers; all committee charters and a list of members

- **Know the legal framework** — Articles, bylaws, Form 990, board-related policies, liability insurance
 - **Know the organization** — A short organizational history, highlighting the key historical events; mission statement; fact sheet about the industry
- Keep the manual current by updating needed pages in hard copies or electronically.

Trainers

To ensure that orientation becomes a formal part of your board education, elevate your nominating committee to a governance committee, which is responsible for orchestrating recruitment as well as helping your board members perform at their best. The governance committee plans the orientation process and involves all the players in it.

As the leader of the board, the chair also is intricately involved in orienting new board members. His words motivate, and his presence serves as an example. By chairing the orientation session, the chair brings clarity to his role and authority. Because the chief executive knows the organization best, she is the most suitable person to introduce the organization and its purpose. Also, this is a great opportunity for board members to see firsthand the chief executive in action and get to know her better. And vice versa: The chief executive will have an opportunity to interact with the new board members 'at home' for the first time. When appropriate, the chief executive may bring in outside experts to talk about relevant industry issues, legal matters, or other subjects to help everyone grasp their expectations better.

Involving board members

There are differing views about the annual presence of all board members during orientation because of repetition in subject matter. Some experts believe everyone's presence feeds into team spirit. Others suggest including the full board only in certain aspects of the training to alleviate boredom. One option is to schedule that part of the orientation that includes the full board to coincide with a board meeting to cut down on traveling.

Assigning every new member of the board a mentor facilitates the learning process. A mentor can answer detailed questions that might surface during orientation and even later, during board meetings. When a new member is feeling lost, mentors can provide direction concerning the hows, whos, and whys of the board.

Take-aways of orientation

Orientation is the first opportunity for all board members to get to know each other. Good for camaraderie

and group dynamics, it also prepares the newcomers for their first board meeting by enabling them to hit the ground running. It sends a message that board service is serious business. Orientation is a fundamental service the organization offers to its leaders and overseers: it prepares everyone for the work ahead and sends a message that support is available.

Learning after orientation

By making orientation a formal process, your organization has taken the important first step in educating its board members. Going forward, the governance committee and the chief executive should ensure that the board embeds learning opportunities into routine governance work as well.

References

- Berit M. Lakey, Sandra R. Hughes and Outi Flynn, *Governance Committee* (BoardSource 2004).
- Berit M. Lakey, *The Board Building Cycle, Second Edition* (BoardSource 2007).

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