

THE

# FIELD GUIDE

TO BOARD ORIENTATION

**A BEST PRACTICES GUIDE  
FOR SURVIVING & THRIVING  
DURING THE ORIENTATION  
PROCESS**



# INTRODUCTION

You want new board members to hit the ground running, right? That way, you'll see value in their contributions on day one.

## FIRST THINGS FIRST

If you've successfully managed the recruitment process, your new board member is a great match for your association; AND you've shared details and expectations BEFORE the candidate commits so there are no surprises at orientation.



***"You don't want it to take a year for a board member to develop enough comfort and confidence to speak at the board table."***

*~ Dr. Rebecca Sutherns, Sage Solutions*



# 1 DETERMINE WHAT YOU ARE TRYING TO ACHIEVE AND SET GOALS.

It's not enough just to have a meeting. Going in, you need to answer: "This orientation will be a success for our association if..." After all, if you can't define success, how can you map your goals and know if you reached them? Try to think along these lines...

## YOUR NEW BOARD MEMBER SHOULD:

- ✓ Feel comfortable and involved
- ✓ Have a sense of camaraderie with the other members
- ✓ Feel motivated
- ✓ Know the association's mission, philosophy, foundation, purpose, goals, policies, programs, services, strengths, needs, etc.
- ✓ Understand their role/responsibilities and their relationship to the association
- ✓ Know how the board works, such as how meetings are conducted (e.g. Robert's Rules of Order), how communication is sent, etc.
- ✓ Be clear on processes such as how decisions are made and what a board consensus looks like
- ✓ Understand what optimal board performance is
- ✓ Recognize how to be a productive board member



***"Involve new members in relevant committees or on projects that interest them at the first meeting. Strike while the iron is hot, and get people involved while energy is high."***

*~ Gillian Kaye , Collaboration & Planning Consultant and Coach*

# 2

## DECIDE HOW THE ORIENTATION WILL TAKE PLACE.

The next step is to decide how to structure the orientation. There are dozens of ways to format it and many decisions to be made.

### WHAT IS THE ORIENTATION PLAN?

- ✓ Will it be a retreat or a meeting?
- ✓ Does it need to be done remotely?
- ✓ Are you using a facilitator?
- ✓ Will it last a few hours, an entire day, or longer?
- ✓ Will it occur over multiple sessions or in a single sitting?
- ✓ Who should attend?
- ✓ If current board members attend (as a refresher), will they lead part of the orientation?
- ✓ Will there be an opportunity to introduce the staff?



***Decide in advance if you're going to have room on the agenda to dig into substantive conversations.***

# 3

## PREPARE ATTENDEES FOR MAXIMUM PAYOFF.

Let everyone know the plan in advance. Meetings are always more efficient if attendees know what they're there to do.

### SHARE THE FOLLOWING INFORMATION BEFORE THE ORIENTATION:

- ✔ Agenda (shoot for quality over quantity)
- ✔ What to bring (for example, "Be sure to bring your board manual and a list of questions.")
- ✔ Tentative list of attendees with an explanation of who they are
- ✔ How much time is scheduled for each item
- ✔ List of presenters (if someone other than you is presenting)



***"If the agenda is your road map, then make sure it has all of the stops listed on it, without too many unnecessary side trips. Let everyone know what's going to be discussed."***

*~ Gillian Kaye , Collaboration & Planning Consultant and Coach*

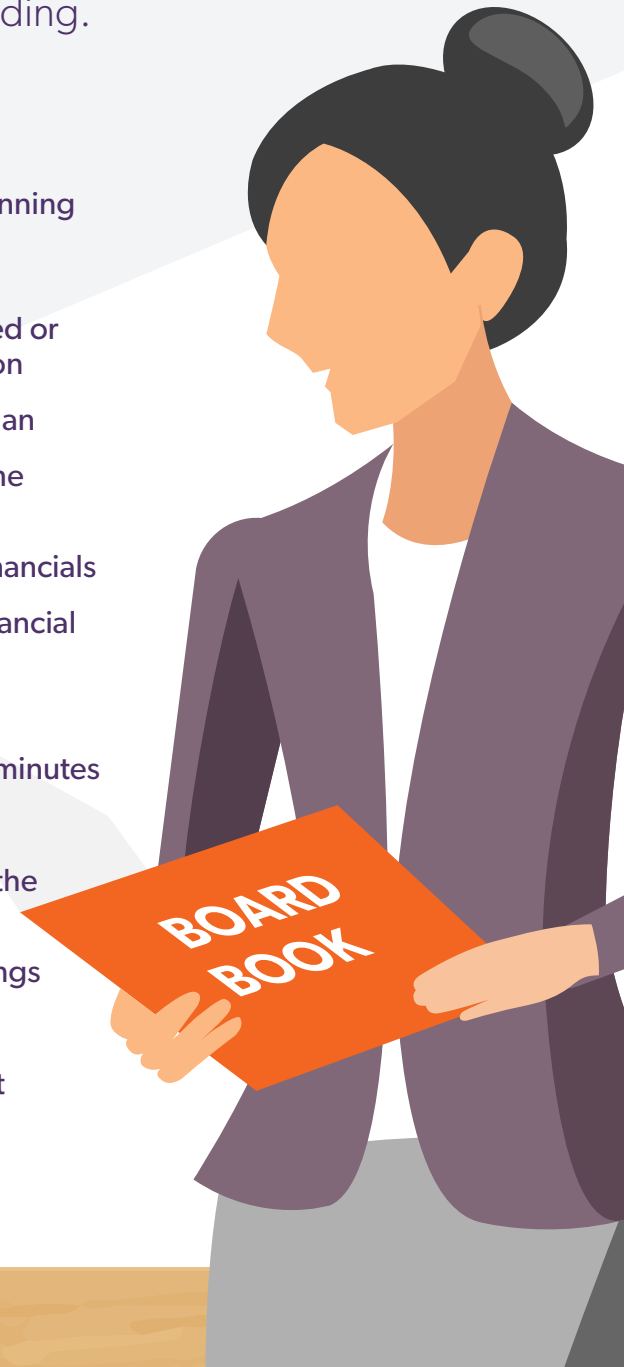


# THE BOARD BOOK

Any association worth its salt should have a detailed manual for their board of directors. Specifics are the key to efficiency and will reduce the potential for confrontations and misunderstanding.

## A ROBUST BOARD BOOK SHOULD INCLUDE:

- ✓ Welcome letter
- ✓ Board roles, responsibilities, and requirements for involvement
- ✓ Conflict of interest policy and questionnaire
- ✓ The board's structure and how it relates to the association
- ✓ Information on board insurance coverage
- ✓ Board policies and procedures (e.g. travel reimbursement, whistleblower policy)
- ✓ Board member contract – letter of agreement
- ✓ Confidentiality agreement
- ✓ List of all current board members: Bios of current board members and key staff
- ✓ Role of existing board members
- ✓ List of board committees, who is in charge, and members of each
- ✓ How the board conducts meetings (e.g. Robert's rules of order)
- ✓ Board processes
- ✓ Division of roles between board and Executive Director/CEO
- ✓ Executive Director/CEO compensation performance appraisal process
- ✓ Staff Organizational Chart: organizational structure/history
- ✓ Glossary of abbreviations and acronyms commonly used
- ✓ Mission statement
- ✓ A copy of the association's by-laws
- ✓ History one-pager
- ✓ Strategic plan / any planning document (e.g. vision document)
- ✓ Listing of facilities owned or rented by the association
- ✓ Emergency response plan
- ✓ Approved budget for the calendar year
- ✓ Most recent monthly financials
- ✓ Most recent audited financial statement
- ✓ Most recent newsletter
- ✓ Recent board meeting minutes
- ✓ Fundraising one-pager
- ✓ Program highlights for the year-to-date
- ✓ List of upcoming meetings
- ✓ Event schedule
- ✓ The agenda for the next meeting



# 4

## DO A POST-ORIENTATION DEBRIEFING

Immediately afterwards – before checking email or returning calls – sit down for 10 minutes and do an evaluation on how you thought things went.



*Keep your eye out for feedback that can be implemented immediately for the very next board meeting.*

### YOUR PERSONAL DEBRIEF CAN INCLUDE QUESTIONS LIKE:

- ✓ What worked and what didn't?
- ✓ What should have been included?
- ✓ What was a waste of time? What would you change for next time?

Jot down any a-ha moments you had during the meeting. Next, you should have already prepared a feedback request for attendees. Valuable insight can be gleaned from this and will be useful when planning for the next orientation.



### ATTENDEE FEEDBACK REQUEST SHOULD:

- ✓ Be sent out ASAP (possibly with the meeting minutes)
- ✓ Ask for their opinions about what they thought about orientation and training

Remember, a meeting planner and facilitator is often so immersed in the details, they are unable to recognize obvious opportunities for improvement. Open your mind to the feedback and truly consider what can be improved for next time.

SOURCES:

KU Community Toolbox  
[tb.ku.edu](http://tb.ku.edu)

The National Center for Nonprofit Boards aka [boardsource.org](http://boardsource.org)

DC Bar Association  
[www.dcbar.org](http://www.dcbar.org)

Sage Solutions  
[www.sagenonprofitconsulting.com](http://www.sagenonprofitconsulting.com)



## ABOUT GROWTHZONE

GrowthZone is the first Association Management Software fully integrated with sales funnel management. It's a smarter solution designed for efficiency and growth. The cloud-based system is powerful, easy to use, and designed to manage all the day-to-day operations of your organization.

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