Guest Column
Fall 2002

Board Education and Orientation

By Robert C. Harris, CAE

After many board meetings I hear the staff say, “they loaded me up with all sorts of new projects.” One way to ease the volunteers from unloading on staff is to educate leaders about their roles and responsibilities, strategic goals, resources and committees.

Starting with Nominations

The education process starts with the nominating committee explaining the expectations and qualifications required of leadership. The purpose of nominations is not simply identifying potential leaders

By having the committee inform candidates of their responsibilities, the message has the power of coming from their peers and not staff. Don’t be afraid of asking the nominating committee to require a *written pledge* of nominees that they will fulfill their duties.

The committee should inform nominees of the time and financial expectations, plus discuss the added requirements for committee participation, fund-raising, etc. Nominees’ skills should complement the strategic goals. (This is also the time to advise leaders they are expected to open their e-mail at least weekly, including attachments!)

Orienting the Board

After elections, an orientation is key to a successful year. Many organizations disregard it because the board or chairperson thinks it isn’t important or there isn’t enough time.

Orientation is the opportunity for staff to explain board responsibilities, the board-staff relationship and organizational goals. A well-planned orientation takes 2 to 3 hours and makes a lasting impact. It should not be something squeezed into the coffee break at a meeting!

Orientation Manuals

An orientation manual transfers knowledge to volunteers. Give them the information and tools they need to be good leaders early in their term.

Few volunteers understand the *mechanics* of boardmanship. While each director may be good at running a business or the best in his or her profession, they may feel uneasy with agendas, rules of order, nonprofit finances and governance.

Once you create a manual it is easy to update annually. Stress to leaders that the manual has the answers needed for good governance and can reduce calls to the staff with questions that can be answered by its contents.

Here are some items to include in your manual.

- Bylaws
- Calendar of Events
- Board, Staff Rosters
- Committees, Chapters
- Budget
- Mission Statement

- History-Fact Sheet
- Strategic Plan
- Forms
- Rules of Order
- Member Benefits/Services
- Policies

The most common format for an orientation manual is a three-ring binder. (The table of contents can serve as the orientation agenda.) Other formats include a virtual manual hosted on a website or a CD-ROM with all contents.

The Orientation Agenda

Boards think of orientation as a static presentation about the organization's history and purpose. They spend 100% of the time listening and never discuss leader responsibilities.

Orientation discussion should be allocated to include discussions of 30% history, purpose and operations; 30% board roles and responsibilities; 15% on board risks, and 25% goals and how to achieve them.

Barriers

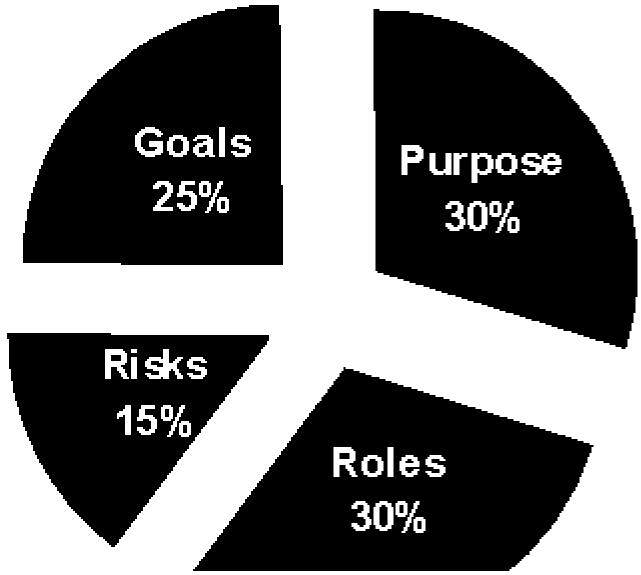
There are barriers to governance that should be discussed at orientation.

- **Sacred Cows** – Anything that is regarded as being untouchable. For example, a board member who never shows up but has been on the board for a year. Or a pet project that has cost the organization time and money with minimal return, but is favored by a small group.
- **Size Matters** – The average board size is 19 persons. Larger boards can be unwieldy and costly. Nonprofit boards are downsizing to expedite decision-making.
- **Personal Agendas** – Ask leaders to check personal agendas at the door. The actions of the board are for the well-being of the organization and must be supported by everyone, no matter whether they voted for or against motions.
- **Finances Count** – Spend extra time with the elected treasurer to build their confidence in understanding and presenting financial reports. You want a treasurer that can satisfy the leadership that safeguards exist and he or she has the complete picture of assets.
- **Respect for Chair and Agenda** – All discussion and motions go through the chairperson who maintains order and runs a fair and efficient meeting. The purpose of an agenda is to focus on important matters and to avoid sidebar chats that create antitrust or libel risks, for instance.
- Run Like a Business – Successful nonprofits are complex, even becoming management companies themselves. Many boards oversee a combination of foundations, political action committees and for-profit companies. (Remember the term "not-for-profit" is only a classification and does not mean the organization should not make a profit or build reserves!)
- Be Futurists – The board's role is not micromanagement but rather setting the course to guide the organization to best serve the trade or profession. Keep the leadership focused on the future; help them monitor trends and provide reports to anticipate and make assumptions about members' needs.
- Obsession – If there is one obsession at the board table, it should be on the mission, vision and value. Work and resources should be directed at the goals in the strategic plan. The plan is your organization's roadmap.

In summary, an effective orientation improves the understanding and work of volunteers. It clarifies roles for leaders and keeps them on track to achieve the organization's mission.

# # #

Robert C. Harris, CAE, conducts association strategic planning and leadership development. He can be contacted at bob@rchcae.com or 850/570-6000 in Tallahassee, FL. Additional information about board orientation is posted on his website at www.nonprofitcenter.com.



[Note to Editor:
You may edit for clarity, grammar and length – for use at will. Seminars are available to teach leadership development and board training.]

An effective board orientation takes 2 – 3 hours.