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Use Board Orientation to Refresh and Blend

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Boards often scoff at the idea of an annual leadership orientation. They say, “We had a good one three years ago,” or “there are only 2 new members on the board – we’ll do something for them next year.”

Annual orientation is the platform and catalyst for good governance. Besides imparting knowledge of the association and director duties, it has subsequent benefits.

Refresh

While directors may say they don’t need to sit through another orientation, things evolve. An environmental scan will disclose opportunities and threats. Directors should take a fresh look at resources (especially limitations) such as financial statements. Similarly, a multi-year strategic plan should be reviewed annually to highlight achievements and next year’s priorities.

Blend

Orientation is a way to integrate newer directors with those who have experience. There is value in having discussions with directors having different levels of experience. Some organizations ask senior directors to mentor new board members. The organic sharing of information is invaluable.

Comply

The IRS suggests that directors disclose conflicts of interest on an annual basis, and more frequently with their Form 990 question, “Did the organization regularly and consistently monitor compliance with the policy?” Orientation is an opportunity to discuss potential conflicts and how they should be handled. The FTC urges trade associations to have a measure in place to avoid antitrust violations; orientation is a chance to educate directors.

Documents

For effective governance directors should receive or have access to the association’s governing documents (bylaws, policies, articles of incorporation as well as financial reports and strategic plan.) They may be provided in a leadership manual or accessible in a password protected online board portal.

Signature

Use the meeting to affirm that directors have received the information and are willing to abide by the rules. Ask directors to sign a form indicating they received and will read the governing documents; will work to advance the mission; will disclose conflicts of interest; will avoid antitrust violations; and will support the decisions of the board.

Time Frame

Orientation can be conducted in a period from 90 minutes to a more relaxed half day. The content and delivery should be efficient and effective (reflecting how meetings will be conducted through the year.) Frequently a professional facilitator is brought in every few years to leave a lasting impact. Orientation may be enhanced with a team building exercise or an outing such as golf.

Instructors

Sometimes the association's executive director conducts the orientation. However, that is a little like an employee telling their boss what to do. Many organizations use a respected executive from a nearby association or the national office. Multiple presenters can lead orientation, including an accountant (finances, Form 990), attorney (risk avoidance) and insurance agent (coverages.) While the incoming elected president may offer to do the orientation, it may be best if they offer only a portion and leave the governance and fiduciary discussion to professionals.

New Directors

For the newest directors, some executives conduct a one-to-one orientation by inviting leaders to the association or by visiting their offices. A thorough review of the leadership manual, finances and rosters are a worthy investment in time.

Proof

Record in meeting minutes that the orientation was held and who attended. There may be a time, related to a legal case, when an attorney or judge inquires whether or not the board received an orientation. The minutes will serve as proof.

Future Leaders

Orientation is an opportunity to broaden the leadership base. Consider inviting committee chairs and vice chairs, as well as the organization's young professionals and future leaders.

View orientation as an annual investment of just a few hours that results in improved understanding, performance and outcomes.

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Note: Bob Harris, CAE, provides governance tips and templates at www.nonprofitcenter.com