



Orientation 101

New board members need more than a briefing on their organization — and the role they play in it

By Dottie Schindlinger

Few things are more satisfying to new board members than the realization that they have not only made a smart decision to join a board but that they can immediately begin to make meaningful contributions. And nothing fosters that certainty more than a dynamic, interactive board orientation.

Continuing education

Orientation should be thought of as a process rather than a one-day meeting — and it should be structured to promote self-guided discovery by board members. This can be done in an intentional, manageable and powerful way by following a few key practices:

Centralize information: One important step is to share documents the existing board believes best define its work and priorities and to do so in one central repository. Providing these resources in one place, such as a board portal, not only makes the process more efficient for new members but also allows them to easily find needed resources as they grow into their role.

Share key documents: Some organizations choose to jump-start the learning process and foster transparency by

sharing with board candidates background information about the organization and the commitments directors are expected to make, even before candidates decide whether to join the board. Past meeting minutes and discussions, board policies, the organization's articles of incorporation and by-

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laws, descriptions of board processes, and the organization's mission and history are examples of key documents board members should have at their disposal to review before their first orientation session.

Cultivate questions: New members also should be encouraged to jot down questions to bring to the orientation meeting. These may range from queries on the ins and outs of how board or committee meetings work to questions about the organization's future

focus. Asking new trustees to think about their questions in advance can help focus the orientation process on what new members will need to be successful.

Launching orientation with a request for questions not only stimulates new trustees' curiosity but also signals that passive listening is not the board's style. It sets up a dynamic emphasizing that board members are responsible for their own learning and that questions are encouraged to gain the clarity needed for solid board decision-making.

Focus on culture: Effective orientation processes also help new board members understand the board's culture. Sharing biographies and background information on all board members and having the CEO discuss the organization's mission, priorities and challenges give new board members context that can provide insight into board dynamics and practices.

New trustees can benefit from a mentor or "board buddy" who acts as a sounding board throughout their first year of service. Mentors can answer questions new board members might not want to ask during meetings and can help clarify and share further insight into the board's culture. An experienced board member (or even one who has recently rotated off the board) who has a professional background or

interests similar to those of the new trustee is likely to be the best fit. Both parties should be allowed to bow out of the arrangement or change partners if they don't jell.

Plan presentations: Asking new trustees to give a presentation to the board early in their service can help deepen their engagement in governance. There's no better way to learn than to prepare for and give a presentation. A new trustee might sit in on a physician lecture to residents, attend

a fundraising event or learn about a new piece of equipment the hospital has purchased and then report back to the board on what he or she has learned in a short (five-minute) presentation. This helps the new board member more deeply understand and align with the organization's mission and reinvigorates the rest of the board through learning about that connection from a new perspective. Alternately, asking a new trustee to brief the board on his or her area of expertise showcases the new member's strengths while providing board education.

Commit to committees: Participating in board committees helps new board members hit the ground running. Committee work allows everyone to roll up

their sleeves and get things done and enables new trustees to quickly and easily add value to the board.

New board members should be asked to prepare a committee report sometime within their first six months of service. Studying how other reports have been done, and their tone and structure, and being responsible for independent learning spark a level of thinking different from newer board members may have had in the past. This can help them become more engaged and invested in organizational performance and outcomes.

Pulling it all together

New-member orientation gives board leaders and executives an opportunity

to align new trustees' activities with their interests and strengths in order to maximize the value they bring to board service.

It's important for boards to really take the time to find out what motivates new trustees and what makes them tick. Orientation is a journey based on the premise that new trustees desire to make a contribution. A great orientation helps channel and capitalize on that desire at its freshest and most critical point. **T**

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