

Board Boot Camp: How to Effectively Orient Your Board of Directors

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Faculty Disclosure

- Faculty Name: Jenny Hoffman
- Conflicts of Interest: None
- Employer: Sigma Theta Tau International
- Sponsorship/Commercial Support: None

Objectives

- Establish expectations for board roles and terms
- Develop a plan for transitioning new board members
- Learn about resources available to conduct successful orientations

Question for the Audience

New Board Members:

What are the top 3-4 needs/worries/concerns that you have had as a new board member?

Seasoned Board Members:

What are the top 3-4 frustrations you have had as a board member?

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Why?

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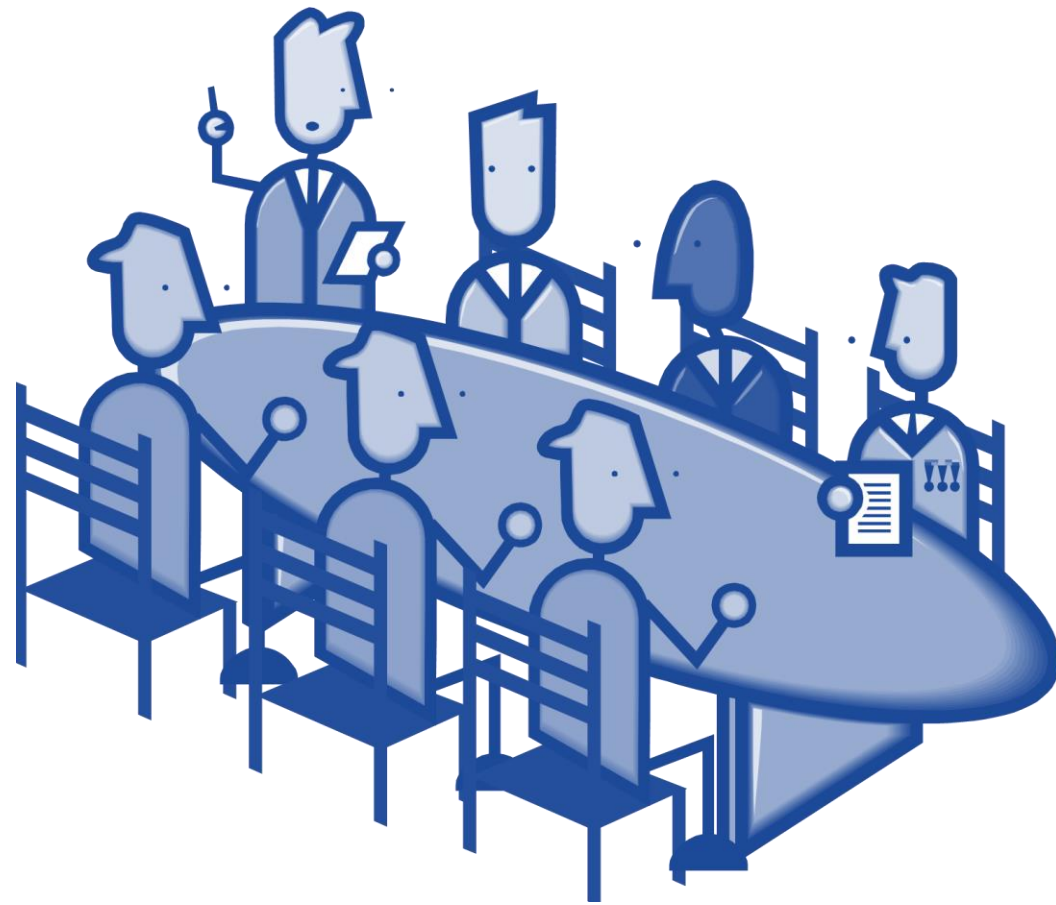
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Orientation is the first image a volunteer has of your chapter.

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Planning the Orientation: Date(s) and Location

- What day of the week works best for this new group?
- What time of day?
- How much time will it take?
- Will this be an in-person or virtual orientation?
 - In-person Orientation
 - What is the budget to rent a venue? Food?
 - Community locations such as hotels, libraries, hospitals, universities, etc.
 - Virtual Orientation
 - Do you have access to a virtual meeting platform?
 - GoToWebinar
 - Skype

Planning the Orientation: New Board

- What can you contribute to the board?
- What will the existing board need to know about you?
- What questions do you have about your new role?

Planning the Orientation: Existing Board

- Conduct a SOAR analysis of the previous year
 - **S**trengths
 - **O**pportunities
 - **A**spirations
 - **R**esults
- Finalize all outstanding projects
- Review evaluations from previous events/programs/fundraisers
- Document all upcoming activities and events for discussion

Delegating Tasks

- Preparing agenda
- Facilitating orientation
- Planning orientation details
 - Guest speaker, technological needs, meal(s)/snack(s), etc.
- Securing needs
- Preparing orientation packets/making copies
- Conducting team building activities
- Taking notes during orientation
- Establishing and executing budget for orientation

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Who Will You Delegate These Tasks To?

- Preparing agenda
- Facilitating orientation
- Planning orientation details
 - Guest speaker, technological needs, meal(s)/snack(s), etc.
- Securing needs
- Preparing orientation packets/making copies
- Conducting team building activities
- Taking notes during orientation
- Establishing and executing budget for orientation
- President
- President or Counselor
- Anyone
- Anyone
- Secretary
- Suggest guest
- Secretary
- Treasurer

Roles & Responsibilities

- Board role as a whole
 - Execute the mission and vision of the organization by creating programs and initiatives for the **members first**, then the community at large
- Specific role function
 - Some components may be determined by organizational bylaws or policies
 - Other components need to be agreed upon by group for each position
 - President
 - Vice President
 - Treasurer
 - Secretary
 - Governance Committee
 - Leadership Succession Committee
 - Other

Timelines and Skill Sets

- Write down the length of the term of office (i.e., two years) for each position
- Include how many hours per month are dedicated to the role
- Document any necessary skills the person will need to be successful in that particular role.
 - For example: A treasurer should be good with numbers, organized, and trustworthy.

Transitioning Board Members

- Pre-orientation

- Collecting all items pertaining to position

- Policies & Procedures for position
 - Position description (determine if any edits or additions are needed)
 - Treasurer – bank statements, bank book, bank card
 - Secretary – meeting minutes, rosters, email account passwords
 - Finalizing all outstanding projects
 - Create a transition packet for new board members
 - Schedule time to discuss details of position
 - Transfer any items
 - Authorized persons on bank account, contact for SoN, SGA, SAB

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Communicate in Advance

- **Board Communications**

- Board meeting reminders - 1 week prior, 1 day prior
- Sending out meeting minutes – At least 1 week prior and again at 24 hours prior
- Remember to use the mode(s) of communication that is most effective (email or phone)

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Food for Thought

What can a positive board experience contribute to the perspective leaders?

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During the Orientation



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Incorporate Team Building Activities

- Icebreakers

- *Leadership Institute*

- Team building activities are “designed to keep the entire group active for the entire event whether your group is 50 to 5,000 people strong”
 - Assist with creating a team culture

- Personality-type assessment

- *True Colors*

- Blue – strong desire to influence others
 - Gold – handle details and hard working
 - Orange – enjoys independence and freedom, while utilizing coordination and tools
 - Green – enjoys a challenge, developing models/exploring ideas/build systems

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Discuss Organizational Standards

- What is the history of your organization?
- Are there any organizational expectations?
 - Attend trainings
 - Complete tasks
 - Consult with staff at least once a quarter (if applicable)
 - Local, Regional and International initiatives?
- Do you know the organizational mission?
 - For example: *“Leading the fight to treat and cure ALS through global research and nationwide advocacy while also empowering people with Lou Gehrig’s Disease and their families to live fuller lives by providing them with compassionate care and support.” –The ALS Association*

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Develop Group Norms

- Attending organizational trainings
- Communicate with organizational staff, as needed
- Follow all deadlines set
- Attend board meetings
- Prepare reports
- Participate and support membership initiatives (recruitment, retention, business meetings, events/programs/fundraising)

Activity

In a small group or pair, develop sample group norms based on the needs of your board of directors.

Set Organizational Goals

- Within the...
 - first 3-6 months
 - first year
 - 1-2 years
 - 2-5 years (projections)
- Overall goals
- Programs & Benefits
- Communications and Publicity
- Goals/Projects/Planning
- Recruitment & Retention (for membership organizations)

Construct a Strategic Plan

- T.E.A.M. approach
 - **T**he president should drive development and implementation of the plan
 - **E**xecutive board members should be involved
 - **A** member at-large or small sub-committee should serve as a representative of the membership
 - **M**ultiple representatives from committees and task forces will ultimately carry out the plan

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Construct a Strategic Plan

- Executing the plan
 - Enter the priority goal, based on the goals set
 - List the action items to accomplish the goal
 - Identify who is responsible for the goal and who can help
 - Estimate what financial resources will be needed to carry out each goal
 - Establish a timeline for each action items and the goal itself
 - Identify the result or outcomes to measure if your goal will be accomplished
- Align the budget with your goals
 - Long term or short term?
 - How much will initiatives cost?

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Construct a Strategic Plan

- Evaluate the Plan

- Previous goals/strategic plans
- Membership retention rates
- Invitation acceptance rates
- Client/Constituent demographics
- Membership dues (income) available
- Constituent satisfaction
- Data from past events (Surveys – well received, made a profit (if applicable), and what kind of feedback was received)

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Next Steps

- Determine next meeting dates for the board
- Begin assigned action items according to determined timeline in strategic plan
- Investigate and register for needed trainings



After the Orientation



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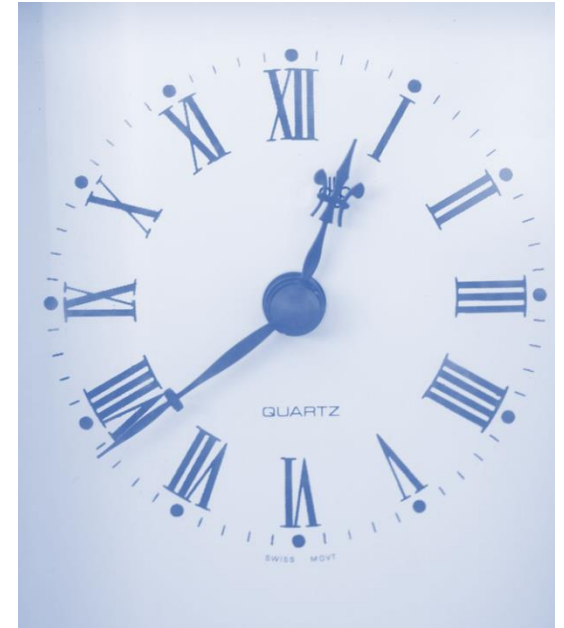
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Transitioning Board Members

- Post orientation
 - Answer any remaining questions for new board member
 - Be available to new board member for the first 6 months for any support needed

New Board Members

- Track your time
 - Does the job description need to be altered?
- Track your tasks and achievement of goals
 - Do the skill sets need to be altered?
 - Are there resources that were incredibly helpful?



Display Your Pride

- Have your leaders and members be a “walking billboard” for the organization
 - T-shirts, lanyards, pens/pencils, notebooks/folders
- Recognize those who are meeting timelines and exceeding expectations
 - “Professional Spotlight”
 - Quarterly nominations for chapter volunteers to win a gift card



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Recruit Your Committees and Volunteers

- Determine tasks or components of your job description that could be delegated
 - For example: A secretary might want a Communications Committee to help communicate with the membership:
 - Post to the chapter website
 - Download membership rosters and organizational logos/colors
 - Develop fliers and other collateral
- List the skill sets a person would need to be successful in that role
 - For example: Someone on the communications committee would need to be trustworthy (handling confidential contact information), familiar with technology, and willing to adhere to the stated organizational brand standards

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HAVE
FUN!

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Resources

May, Kristin (2014). How to Develop a Better Staff Orientation. Available at <http://smallbusiness.chron.com/develop-better-staff-orientation-31779.html>

Meier, Sharon (2014). *How to Develop a New Employee Orientation Program*. Available at http://www.ehow.com/how_7509963_develop-new-employee-orientation-program.html

Building an Effective Orientation Program. Available at <http://www.oasisadvantage.com/building-an-effective-orientation-program>

Questions?

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Upcoming Sessions

- What's in it for ME? How to Provide Membership Benefits
- Harnessing the Power of the Digital Age: Best Practices for Chapter Websites
- Sustainability Skills: Making it Through your First Years as a Chapter
- Five Factors to Foster Board Unity

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