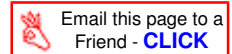




## Board Orientation Do's and Don'ts



**Don't** let decisions about content be entirely staff-driven.

**Do** have the board members themselves determine what they need to know to govern accountably, with input from the CEO.

**Don't** allow the orientation activities to be determined by the staff.

**Do** have the board's Board Accountability Committee use the board's brainstormed list to create the day's agenda. Have the committee determine which portions the staff should present, and specifically what content they want presented at that time. That will prevent a staff person from rambling on for ½ hour about his/her program.

**Don't** put off the orientation until board members "have time."

**Do** calendar the board's whole year's worth of activities, from adoption of the budget to election of officers / annual meeting, to the annual orientation. That will give everyone notice a year in advance of the orientation!

**Don't** think just because someone holds a professional position in "real life," that he/she necessarily understands financial matters. A great number of board members from all walks of life make financial decisions without completely understanding the core financial issues at hand.

**Do** include a brief review of 101 level finance in your orientation. **Do** have the treasurer offer to privately mentor anyone who is embarrassed about a lack of financial knowledge.

**Don't** think orientation is just for new board members.

**Do** have the board annually determine what all board members need to learn in order to govern, and have them all attend orientation every year. You can call it "Orientation and Board Re-Training"!

**Don't** stock your board manual so full of "stuff" that it is no longer useful.

**Do** ask board members what materials would be helpful to have with them at all times, and use that list to build your manual.

**Don't** forget boards need ongoing education, all year long - both on the specifics of what the organization does, and on the overall themes of Governance and Accountability.

**Do** consider making some of your "orientation" an ongoing year-round learning process, perhaps just 15 minutes at every board meeting.


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**Don't** forget the simple introductory things that make the human side of boards work more smoothly.

**Do** wear name tags at meetings. It helps new people feel less new, and helps outsiders address board members by name, instead of "The gentleman in the brown sweater." And do have food, even if it's just popcorn - people work better together when they're fed!

**Don't** make your annual orientation all business.

**Do** have a light dinner immediately following your annual orientation. Board members work best when they know each other better, and the orientation will give them Organization:Organization:much to talk about over dinner afterwards!

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