



BOARD BUILDING ORIENTATION OF BOARD MEMBERS

Orientation is the next step in the board building process. As part of leadership development, new board members need to acquaint themselves thoroughly with the club. Do not assume that all information conveyed during the recruitment process has been remembered. The club should no longer have to "sell" itself to new board members, but it should continue to provide them with fresh information and more detail.

CONDUCTING AN ORIENTATION SESSION

An orientation session should be held before each new board member attends his or her first board meeting. This will help the new member participate fully on the board as quickly as possible. The session may be organized by the board development committee, the head coach, and/or the board chair. Key board and staff members, such as the board chair and head coach should take part in the orientation. It is also appropriate to invite current board members to attend all or part of the orientation as a refresher and to meet the new members.

It is beneficial to hold the orientation at the club's headquarters, if convenient for board members, to give them a tour of the facility and a sense of the working environment. A quiet, comfortable location off-site is also appropriate. The agenda for an orientation session can be crafted to fit varying amounts of time ranging from an hour or two to a half-day; it might include a tour and refreshments, in addition to formal presentations and time for questions from new members.

By the conclusion of the orientation, new board members should have a sense of:

- The club's mission and programs,
- The club's finances,
- The club's fund-raising initiatives,
- The structure of the board and staff, and
- Their roles and responsibilities as board members.

Smart boards include current board members in the orientation of new members for a number of reasons, among them to get old and new members acquainted and to point out the importance of board members knowing important information. Smart boards also schedule a follow-up orientation several months later to respond to the questions that new members may have once they realize the information they still need.

ABOUT THE CLUB

Information	Issues	Presentation Options
Program	Offer new board members a feel for the work of the club-What it does, whom it serves, what difference it makes to get them emotionally and intellectually connected and motivated	<ul style="list-style-type: none"> • Tour of facilities (maybe they have never seen the pool) • Observation of practice • Presentation by swimmer and/or board member • Videos, slides, film presentation • Verbal presentations • Written materials
Finances	Help new board members become informed about where money comes from, how it is spent and the state of the club's financial health.	<ul style="list-style-type: none"> • Presentation by chief executive, chief financial officer, or treasurer • Background materials (most recent audit, budget, financials), graphically presented if possible

History	Provide sufficient knowledge about the past so that the present makes sense. Also, help them see their own participation as part of the club's ongoing story	<ul style="list-style-type: none"> • Stories told by "old timers" • Pictures • Written materials
Strategic Direction	Present a framework for new members to participate effectively. Clarify the mission, vision, club values, and goals that inform club actions	<ul style="list-style-type: none"> • Presentation/discussion led by the head coach or board chair • Copy of strategic plan (or other documents, especially mission statement, if no plan is available)
Club Structure	Help new board members understand who does what and what the lines of accountability are.	<ul style="list-style-type: none"> • Copy of the bylaws, IRS Determination Letter • Club chart • Introduction to head coach and/or coaching staff or key staff.

ABOUT THE CLUB

Information	Issues	Presentation Options
Board Roles	Assure that new members understand the roles of the board	<ul style="list-style-type: none"> • Presentation/discussion, preferably with the whole board involved • Written materials
Board Member Responsibilities	Assure that new board members understand their own responsibilities as board members	<ul style="list-style-type: none"> • Presentation/discussion • Signed agreement (job description), including conflict of interest and ethical statements
Board Operations	Help new board members understand how the board operates so that they may participate effectively	<ul style="list-style-type: none"> • Board manual • Assign board mentors • Committee lists, with committee charges and member lists • Meeting schedule
Board Members	Facilitate new board member integration with other members	<ul style="list-style-type: none"> • List of board members • Board member biographical data • Time set aside for social interaction

Board Manual

Prior to or at the orientation, each new board member should receive a board manual that introduces him or her to the club and the board. Although some of this information may have been provided previously to the new board member, the board manual should contain written materials that help familiarize board members with the club.

The following elements are found in most board manuals.

- History/mission of the club (including club member statistics)
- Board member job description
- Legal documents (articles of incorporation, bylaws)
- Budget, financial statements, last annual audit
- Roster of current board members
- Club's strategic plan, major goals
- Overview of programs, staff information
- Information on committees, committee assignments, and orientation (and selected board meeting minutes)
- Calendar of activities, board meetings, special events, etc.

Board Mentoring

The nominating committee could pair up a new board member with a more seasoned board member and ask the experienced member to stay in contact with the new member during his or her first year on the board. The board mentor can answer questions about the board and helping the newcomer to feel welcome. The relationship could be structured or less formal, depending upon the needs of the new member.

Other Suggestions

Each new board member should serve on one or two committees to learn how the board carries out its work and to become more involved with a particular aspect of the club. It is important to share committee job descriptions and goals with each member and to orient them to how to be effective committee members.

Taken from the "Club Leadership Development Notebook" a publication from *BoardSource* created specifically for USA Swimming. For more information about *BoardSource* write to 1828 L Street NW, Suite 900, Washington, DC 20036-5114. Telephone (202) 452-6262. Fax: (202) 452-6299, email: mail@boardsource.org, website: <http://www.boardsource.org/>. Copyright 2000. Used with permission.