

# Board Orientation Training Program

## **I. Recruitment Stage**

1. Introduce the prospect to the agency and its goals at an initial meeting with a recruiting board member and the executive director. Have the recruiting board member pitch the organization and the positive aspects of board membership. At that time, give the prospect an information packet that includes at least the following information:
  - An overview of the organization's purposes, major programs, funding sources, etc.
  - A list of expectations of prospective members—meetings, committee assignments, tenure, and time commitment.
  - A list of current board members and key volunteers.
  - Copy of bylaws and last annual audit of agency.
2. Schedule a visit to the agency by the prospective member to see programs in action or to talk with program staff.
3. Invite the prospect to attend a board meeting to get an idea of how the organization makes decisions and delegates responsibilities.

## **II. New Member Orientation**

1. Schedule a meeting between the new board member and key people in the organization. Provide a detailed Board Member Manual, which should include bylaws, articles of incorporation, program descriptions, current budget, last audited financial statements, list of board members and their addresses, lists of committee and staff assignments, copies of minutes for the previous year, and a copy of the strategic or long-range plan.
2. At first meeting, introduce new member to all current board members and staff. Consider assigning a "mentor" board member to work with the new board member through the first three months. Also, make committee assignment.

## Orientation Training Program (continued)

### III. During First Three Months

1. Have regular check-ins with board "mentor" to answer questions and help member become acquainted.
2. Assign a specific committee task as part of regular implementation process.
3. Continue orientation to the work of the specific committee.
4. Continue to provide written background material to answer questions.

### IV. Ongoing Training

1. Consult with appropriate committee chair and staff to obtain full involvement of new member.
2. Provide assistance in carrying out responsibilities.
3. Provide opportunities for board members to attend special workshops related to the assignments and interest of the member. Provide special leadership training to current and prospective officers.
4. Expand responsibilities and rotate committee assignments to help satisfy the interests and needs of the board member. This has the added advantage of providing continuous development of volunteer leaders for the organization.