



# BoardLink

Your connection to effective bar governance

## Board Orientations that Are Worth the Effort

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I suspect most of us who serve on boards would agree that board orientations are a good idea. I'd like to suggest that consistent orientations actually have the potential to *transform* the effectiveness of the board, if they're done well. There's no magic to it, but a good orientation will take some time to put together. That's a resource that's admittedly scarce for most of us, so this article will give you a head start and lead you through some of the more important questions.

### 1. What's the goal of the board orientation and what kinds of things should we cover?

In my view, we want to help new board members feel comfortable and prepared to participate at the very first board meeting. They should understand good governance and be equipped to make thoughtful decisions, so that our boards can immediately take advantage of all they have to offer. We also want to foster the collective ability of the board to govern and provide leadership for the organization. Therefore, a good orientation is both informational and educational.

Most of our bars do the "information" piece of orientations well. We give new board members information about the bar's budget, programs, and what we get reimbursed for, but we don't spend as much time helping the board coalesce as a group or addressing what I would call the cultural questions. A great orientation should be a mix of the following:

- Introductions – Who are the people in the room and why are they here?
- What are the practical aspects and protocols of being a board member? [What are the frequently asked \(as well as unasked\) questions?](#)
- [What are a board member's legal duties and role?](#)
- What's the current state of the association or foundation, and how has it changed in the last 3-5 years?
- What are the organization's key programs?
- [What are the board's expectations of its own performance for the year?](#)

While most new board members' questions will fall into one of these areas, it's worthwhile to ask if there are specific things board members want to know. Finally, ask returning and outgoing members what they wished they would have known coming onto the board. Collectively, those responses will give you a terrific foundation for your session.

### 2. Who should attend?

Often, orientations are for new members only. Granted, members' time is at a premium, and it's difficult enough for board members to make time for meetings. However, orientations that don't include the entire board are a lost opportunity. Why? One of the most important outcomes of an orientation is a simple one: board members walk away feeling more comfortable with one another. Group dynamics shift with every new board member. A higher level of collegiality and trust makes the exchange at board meetings more vibrant and conflicts easier to manage. Use the orientation to build the group's comfort with itself and foster a shared identity.

### 3. How can we avoid a parade of talking heads and make the session more interactive?

The orientation should make use of every opportunity to foster discussion and interaction among the participants. Here are few practical suggestions:

- Don't gloss over the [introductions](#); ask each person a question about their interests or experience with the bar, or do an icebreaker
- [Make the basics fun](#); turn some of your key financial and program benchmarks into a game or competition
- Don't preach on the administrative stuff: refer to the manual and walk through the table of contents. Explain why processes are in place so that they make sense. Use returning board members and officers to present the information
- Since new (and sometimes returning) board members may be unwilling to ask sensitive questions about board practices, ask an experienced board member to [anticipate what some of those questions might be and engage in a Q&A with the group](#). Alternatively, pair each new board member with a board mentor
- Break into small groups to foster discussion on a topic or question; individuals tend to be more creative and candid in smaller groups
- Reserve time for a closing exercise or question; ask participants what surprised them most about what they learned, or if they have questions that didn't get answered
- Board members are ambassadors; be sure that, by the close, all board members have a compelling story to tell about the organization
- Consider using an [outside facilitator](#) to manage the conversation

### 4. Why do we typically think about orientation as just one event?

We still may be able to bump up the value of our orientations, but we also need to acknowledge and embrace the fact that educating the board is a continual process. One two-hour session isn't going to be a silver bullet. So, what are some of the best ways to integrate ongoing education into the board's activities?

Former Executive Director Alex Lagusch often described Columbus' "just-in-time" approach to orientation. When an issue was placed on the board's agenda, the leadership would add ten or fifteen more minutes to describe the history or context of a particular issue. Having the context attached to actual discussion and/or a decision made the information much more concrete for participants.

Other strategies bar associations and foundations employ for ongoing board education include:

- Explore the costs and impact of one major program or cost center at each board meeting
- Catalog current and past bar programs and services to provide a more comprehensive view of the bar's efforts. ([Idaho's example](#).)
- Invite outside speakers to present on trends and best practices
- Circulate articles of interest
- Take time at board meetings to explore [provocative questions](#) that don't need an immediate answer
- Use the executive director's report to convey important program or benchmark information
- Conduct quarterly [board evaluations](#) based on expectations set by the board, and discuss the results
- Ensure your board is receiving and reading [BoardLink](#)

### 5. Who's responsible for the board's education?

While the executive director should be a partner in any board education effort, the board ultimately should take responsibility for its own learning. Consider creating a small board committee – some organizations call it a governance committee – to collaborate with the staff on the board orientation and ongoing education process.