

STRONG PARKS, STRONG COMMUNITIES

Tool 7: Board Orientation and Training

A thoughtful orientation gives new board members the information on your group's background, programs, and culture that enables them to begin contributing right away.

ORIENTATION MATERIALS

Organizations have traditionally produced resource notebooks for board members. Increasingly, groups are moving these documents into an online space with dedicated content for board members. Here is a list of information to make available for new board members.

- **Board information:** Board roles and responsibilities, board member bios and contact info
- **Organization/historical information:** Park history, organizational history, vision, and mission
- **Program overview:** Description of key programs and current activities
- **Planning and financial documents:** Strategic plan, budget, revenue plan, financial statements
- **Governance documents:** Bylaws, key policies, recent board minutes, Park partnership agreement
- **Key relationships:** National Park Service staff, funders, other non-profits

ORIENTATION PROCESS

Board members more quickly assimilate their role when they understand the organization's position and have strong relationships with the executive director and board. The orientation process helps to do both. The topics below could be covered in conversations that the executive director and/or board member may have with new board members prior to their first board meeting. The goal is to provide history as context, highlight critical information for effective participation in the present, and communicate about the board's work culture and values.

- **History, evolution, mission, vision of the philanthropic partner organization and the park**
- **Strategic Plan overview and board goals:** Affirm interests, identify training needs
- **Program and financial overview:** Current successes and challenges, key points of focus for board and committees
- **Board responsibilities:** Reiterate expectations for meeting preparation, attendance, advocacy; if using personal agreements or work plans, complete and sign these documents
- **Board culture:** Typical meeting structure and decision-making process, communication between meetings
- **Logistics:** Ensure current bio and contact information; address use of photos, affiliations, and other information publicly available about board members; calendar important dates for upcoming meetings and events

ORIENTATION OUTLINE

Welcome Meeting and New Member Orientation

1. Schedule a meeting between the new board member and key people in your organization.
2. At this first meeting, provide a detailed Board Member Handbook. This should include your organization's governing documents, program information, financial information, and board roster, among other items. (see **Board Tool 5, Board Member Handbook**, for a more comprehensive list of suggested contents)
3. At the meeting, introduce the 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(s).
4. Ask each board member to complete the Board Member Agreement (see **Board Tool 6, Board Member Application and Agreement**).

First Three Months

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

Ongoing Training

9. Consult with appropriate committee chair and staff to fully engage the new member.
10. Assist the new member in carrying out responsibilities.
11. Provide opportunities for all board members to attend special workshops related to their assignments and interests. Provide special leadership training to current and prospective officers.
12. Expand responsibilities and rotate committee assignments to help satisfy the interests and needs of all board members. This has the added advantage of providing continuous development of volunteer leaders for the organization.