Checklist for Planning an Effective Orientation

Description
Members often report that board service is one of the most worthwhile experiences in their personal and professional lives. This is understandable considering no other position offers the opportunity to chart the course of a profession, trade or personal avocation. While most members possess a wide range of talents, skills, and expertise, they are often unaware of how unprepared they are to operate effectively in this unique environment. Board orientations address this challenge – if they are designed with the members’ needs in mind and focus on learning how to govern rather than to manage.

This checklist is designed to help you identify the information, skills and techniques necessary to design an effective board development session (orientation, forum, training, etc.). The insight gained from this assessment can be used to create not only the first but also subsequent sessions (or segments of a meeting) dedicated toward building competencies within and among board members and selected staff.

Suggestions for Using This Tool
Consider using this tool in the following ways:

- to design an effective board development session; and
- to identify topics for leadership training.

Key Audiences
- officers and board members
- chairs
- selected staff

Appropriate Settings for Use
- annual retreat
- leadership training conference
- first meeting of a leadership team

Preparation Tips
This piece reflects two separate pieces; each to be reproduced as a two-sided 8.5 x 11-inch document. The first piece provides a guide for designing your leadership development session. The second is the checklist to assist you in assessing your board's general level of awareness and readiness to serve. Set document to print in the portrait orientation. Retain original copyright if reproduced in current form.

You may customize the piece to suit your organization’s culture. Edits made should be sensitive to reflect information and issues that are most relevant to your organization.

When adapting, please respect original copyright by adding the following: Adapted with permission from the Melos Institute, Pacifica, California. Please electronically forward a sample to the Institute so that we may gain insight on how the adaptations have improved its use.

Contact the Melos Institute if you would prefer to have the piece customized for you.
Process for Planning an Effective Orientation

Overview
Members often report that board service is one of the most worthwhile experiences in their personal and professional lives. This is understandable considering no other position offers the opportunity to chart the course of a profession, trade or personal avocation. While most members possess a wide range of talents, skills, and expertise, they are often unaware of how unprepared they are to operate effectively in this unique environment. Board orientations address this challenge – if they are designed with the members’ needs in mind and focus on learning how to govern rather than to manage.

This checklist is designed to help you identify the information, skills and techniques necessary to create an effective board development session (orientation, forum, training, etc.). The insight gained from this assessment can be used to create not only the first but also subsequent sessions (or segments of a meeting) dedicated toward building competencies within and among board members and selected staff.

Instructions
Review and follow the step-by-step instructions given on the following pages, drawing from your personal observations and experiences with your volunteer and staff leadership team. Contact the Melos Institute for new and innovative ideas on how to design and deliver a worthwhile and valuable session.

STEP 1
Gain insight into the goals and expectations of incoming key leaders.
Talk to incoming volunteer leaders about their goals and expectations. Knowing this information and incorporating it into your efforts will help them gain greater ownership, commitment, and support, and will reinforce your board development efforts.

STEP 2
Assess the current level of volunteer and staff leadership readiness.
Review each item on the checklist, then assess the general level of awareness and readiness among new and current leaders. If your organization has been conducting board development sessions for years, consider evaluating only those who are joining the team (unless you discover skills and techniques your current leadership are not exhibiting). Place a check mark in the “Add” column to identify the information you feel needs to be conveyed to your leadership team this year.

STEP 3
Establish a set of objectives for board development.
After reviewing the results of the assessment, establish a set of objectives that identify what you feel board members need to know or do, or behavior they need to exhibit. The statements should reflect the desired results you are seeking to achieve through your board development efforts.

Sample Objective
Board members will demonstrate effective strategic thinking techniques when discussing critical issues.

Your objectives will help determine the manner by which information is shared with your board members and transformed into knowledge.

STEP 4
Determine the most effective means of sharing information.
Determine the optimum time and best method of sharing the information by reviewing those items on the checklist rated with an awareness score of 3 or less.
Process for Planning an Effective Orientation, continued

STEP 4, continued

While all the information you select is important, determine the most appropriate time to share it:

♦ prior to the session (P)
♦ at the on-site event/training session (O)
♦ as an ongoing reference (R)

Add the appropriate code to your assessment in the “Status Design” column.

P preparation materials
information transformed into knowledge-based material, compiled and shared with leaders in print or electronic form prior to the scheduled session
incoming leaders need to review prior to the session to gain a better understanding of the organization

O on-site training/support materials
information, skills, and techniques shared at an on-site or web-based learning session
when sharing on-site, the intent is to engage in some form of discussion and achieve some level of awareness or competency

R reference materials
information transformed into knowledge-based material and provided to leaders for an ongoing reference throughout the year
material that supports the ability to be successful processes and practices of association management. Transforming this information is an opportunity to increase board members’ competencies in a subtle manner. Again, while this step might require more time initially, your return will be greater when members are faced with making important decisions. And if shared and used routinely, these pieces help shape a more productive and consistent board culture.

STEP 5

Create board development session agenda based on selected items and time allotment.
Review those items selected for the on-site session (coded “O”). Determine the time required for presentation of each item. Rank and list the items with appropriate time allocations. Be creative in your effort. Take risks by converting lecture presentations into interactive group activities. While it might take more time, these types of activities will increase participants retention. Contact Melos Institute for suggestions and samples.

STEP 6

Determine how best to transform necessary information into knowledge-based material.
Information has little value if not retained. Raw information is merely data. Board development occurs only when information is transformed into knowledge that can be applied to given problems and policies. Consider the many ways information and data can be interpreted for leaders who are often unfamiliar with the principles, processes and practices of association management. Transforming this information is an opportunity to increase board members’ competencies in a subtle manner. Again, while this step might require more time initially, your return will be greater when members are faced with making important decisions. And if shared and used routinely, these pieces help shape a more productive and consistent board culture.

STEP 7

Target remaining selected items for future attention and plan reinforcement strategies.
Make separate list of those items for which no time exists during the first board development session. Consider using upcoming organization events and meetings to provide additional support. Include strategies at key events and meetings throughout the year that reinforce information shared at the first session.

STEP 8

Review agenda with incoming chief elected officer and key staff.
Build ownership and commitment with and among key volunteer and staff leaders by sharing a draft of the newly created outline for board development (for example, that which will be shared ahead of time, on-site, and designed for ongoing reference). This will help volunteer leaders become more aware of your efforts and build trust; the long-term result will be more productive working relationships. Contact Melos for samples of conceptual outlines for such sessions.

STEP 9

Make necessary adjustments and begin implementation.
Incorporate requests and suggestions, then create a work plan for implementation. Make contact with component or allied groups, professional colleagues, related organizations and specialty groups (like Melos) to secure fresh ideas, innovative delivery techniques, and creative samples.

STEP 10

Establish a method for routine evaluation.
Designate time throughout the year, as well as at the end, to evaluate the effectiveness of your board development efforts. The objectives established at the beginning will serve as the means of evaluation. Be sure to evaluate the effectiveness of strategies introduced throughout the year to help Board members retain information, to reinforce critical learning skills, and to increase their knowledge.
**Instructions**

Read each item on the checklist to determine the board's general level of awareness and readiness. Place a checkmark in the "Add" column to indicate the items that you feel need to be emphasized with your volunteer leaders in order to strengthen their effectiveness. Use this to establish a set of objectives that identifies what board members need to know or do, or behave like in their leadership role.

Next, consider the optimum time and best method of sharing information by reviewing the checked items with a score of 3 or less. Choose the best time to share the information with your volunteer leaders and insert the appropriate code in the "Design" column:

- **P** (prior to the session)
- **O** (at the on-site session)
- **R** (as an ongoing reference)

For more information, refer to the detailed instructions accompanying this checklist; or contact the Melos Institute at info@melosinstitute.org.

### Profession, Trade, Personal Avocation

<table>
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<tr>
<th>General Environmental Issues</th>
<th>Board’s Level of Awareness</th>
<th>Status</th>
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<tr>
<td>economic, political, and social factors affecting members</td>
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<td>Add Design</td>
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<td>global issues affecting members</td>
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<table>
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<tr>
<td>pending and emerging regulatory issues</td>
<td>1 2 3 4 5</td>
<td></td>
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<tr>
<td>relationships for advocacy with other groups</td>
<td>1 2 3 4 5</td>
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</tr>
<tr>
<td>allied relationships for legislative/regulatory support</td>
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<table>
<thead>
<tr>
<th>Advancing the Profession, Trade or Personal Avocation</th>
<th>Board’s Level of Awareness</th>
<th>Status</th>
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<td>research efforts</td>
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<tr>
<td>setting/reviewing professional standards</td>
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<td>programs for product testing/endorsement</td>
<td>1 2 3 4 5</td>
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<tr>
<td>certification/designation programs</td>
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<td>code of ethics</td>
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<tr>
<td>spokespersons for public policy and public relations</td>
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### Personal Leadership Competencies

<table>
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<th>Personal Leadership Competencies</th>
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<td>building productive working relationships</td>
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<td>managing effective meetings</td>
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<tr>
<td>negotiation/conflict resolution</td>
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<td>parliamentary procedures</td>
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<td>personal and professional goals</td>
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<td>ability to distinguish objectives from strategies and tactics</td>
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<td>policy development</td>
<td>1 2 3 4 5</td>
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<tr>
<td>public speaking/motivational communication</td>
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<td>effectively recruiting volunteers</td>
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<td>reflective listening</td>
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<tr>
<td>strategic and critical thinking</td>
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## Organizational Awareness:
### Management and Governance

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<th>Board’s Level of Awareness</th>
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<td>Add</td>
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<tr>
<td>Fully Aware</td>
<td>Design</td>
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### Purpose, Direction and Goals
- articles of incorporation, constitution and bylaws: 1 2 3 4 5
- mission, vision and values statements: 1 2 3 4 5
- goals and priorities: 1 2 3 4 5
- strategic or annual plan: 1 2 3 4 5
- governance policies and procedures: 1 2 3 4 5
- organizational liability (unlawful conduct): 1 2 3 4 5

### Rules, Responsibilities, and Expectations
- incoming president’s goals/expectations: 1 2 3 4 5
- roles for volunteer leadership (oversight, policy development, etc.): 1 2 3 4 5
- volunteer leadership organizational structure: 1 2 3 4 5
- board of director’s job description: 1 2 3 4 5
- other volunteer job descriptions (chair, task force, etc.): 1 2 3 4 5
- leader profile form: 1 2 3 4 5
- confidentiality agreement: 1 2 3 4 5
- conflict of interest disclosure policy and agreement: 1 2 3 4 5
- board/committee performance process: 1 2 3 4 5
- leader commitment contract: 1 2 3 4 5
- volunteer leader directory: 1 2 3 4 5

### Management Overview
- management policies and procedures: 1 2 3 4 5
- staff/function organizational structure: 1 2 3 4 5
- executive officer’s job description: 1 2 3 4 5
- communication mediums (mailings, website, fax, etc.): 1 2 3 4 5
- organization’s calendar of events (master): 1 2 3 4 5
- logo use, logo compliance requirements: 1 2 3 4 5

### Financial Overview
- organization’s budget: 1 2 3 4 5
- budgets of affiliated groups (in appropriate): 1 2 3 4 5
- annual report: 1 2 3 4 5
- financial reports: 1 2 3 4 5
- travel and reimbursement policy: 1 2 3 4 5

### Membership Development Information
- membership profile: 1 2 3 4 5
- membership reports: 1 2 3 4 5
- member services package: 1 2 3 4 5
- results of recent member satisfaction and member needs surveys: 1 2 3 4 5
- membership goals (numeric and programmatic): 1 2 3 4 5

### Miscellaneous
- allied relationships (vendors, suppliers, inc.): 1 2 3 4 5
- affiliated relationships (components, foundations, etc.): 1 2 3 4 5
- recognition, awards, and scholarships: 1 2 3 4 5