

# Board Member Orientation

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## Meeting Format

New directors need to feel like they're an integral part of the board as soon as possible. If they don't feel comfortable voicing their opinions, you're all losing valuable input! Information is what will help everybody feel at ease.

No matter how well qualified your new board members are, it will take some time to get them up-to-speed and feeling comfortable as members of your team. But there are steps you can take to hurry this process along.

Conduct an orientation session for all new board members. Have them meet with other board members and officers. Spend time going over background material about the organization and bring them up-to-date on the issues facing the board. Allow plenty of time for questions and answers. Try to cover these topics in a new board member briefing:

## Introduce Everyone - Consider Protocol

- Elected Chairperson or President
- Officers
- Other Board Members
- Committee Chairs and Members
- Staff
- Guests
- Other

## Describe the Organization (Mission)

- Mission Statement
- Organizational Structure
- Who we serve
- What we do
- Other

## Explain and Discuss

- Meeting attendance requirements both full board and committee
- Committee assignments and charges
- Board role and relation to administrator/staff
- Other

## Conduct Tours if Applicable

- Administrative offices
- Other facilities

## Provide Documents Organized in a Manual

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- Mission statement
- Bylaws
- Code of Ethics
- Policy Manual (Policies and Procedures)
- Board meetings, Minutes, Agenda submissions, and Introducing motions
- Minutes of board meetings for the past year
- Annual Report
- Audit Report
- Current Budget
- Current Financial Report
- Museum Practices (ARM – Recommended Practices for Railway Museums)
- Publications, Newsletters, Magazine, and World Wide Web site(s)
- Strategic Plan
- Goals for the year

## **Rosters board members including addresses and telephone numbers**

- List of Board Members and Officers
- List of Committee Memberships including Chairs
- Annual Calendar of Activities and Meetings
- Copies of the Newsletter for the Year
- Other

## **Collect Data at the Meeting'**

- Addresses
- Telephone home and office
- Fax number
- E-mail address
- Best time to contact
- Best time for meetings
- Other

## **Questions and Answers**

- Time for new Board of Directors
- Mentors (Possible assign a veteran Director to new Directors)

These are ways to get board members comfortable with board responsibilities and meeting participation. Not only do the new directors start contributing right way during the meetings, they also develop a good working relationship with the veteran board members.

Plan this meeting within the first month of the term of office. Waiting until the first or second quarter will only delay your board's effectiveness.