



## Strategic Board Development: Checklist for Planning an Effective Orientation

### Description

Members often find board service one of the most worthwhile experiences in their personal and professional lives. While most members possess a wide range of talents, skills, and expertise, they are often unaware 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 increase competencies among your board.

### Suggestions for Using This Tool

Use this as a planning tool in the following ways:

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

### Key Audiences

- officers and board members
- chairs
- selected staff

### Appropriate Settings for Use

- annual retreats
- leadership training conference
- first meeting of leadership team

### Preparation Tips

To assemble material, photocopy the following pages as a two-sided 8.5×11-inch document. To increase its visual appeal, consider reproducing this document on light-colored paper or card stock.

Customize the piece to suit your organization's culture. Edits should be made to reflect information most relevant to your organization. Please respect the original authorship with copyright recognition (adapted from/reprinted

with permission from the Center for Excellence in Association Leadership).

If time is critical, consider having CEAL customize and print this piece for your organization. Contact Trish Hudson, CAE, for more information (650.355.4094 or [trish@cealweb.com](mailto:trish@cealweb.com)).

### What Is CEAL?

Based in San Francisco, CEAL offers programs, products, and services designed to assist you in achieving your association's goals. Support is provided within six association core program areas:

- membership development
- member services
- management and governance
- communication and public relations
- leadership development
- legislative and regulatory influence

Our programs, products, and services include:

- consultation and facilitation services
- training and development support
- products and tools
- applied research

Contact us to explore how we might support you:

650.355.4094 or [info@cealweb.com](mailto:info@cealweb.com)

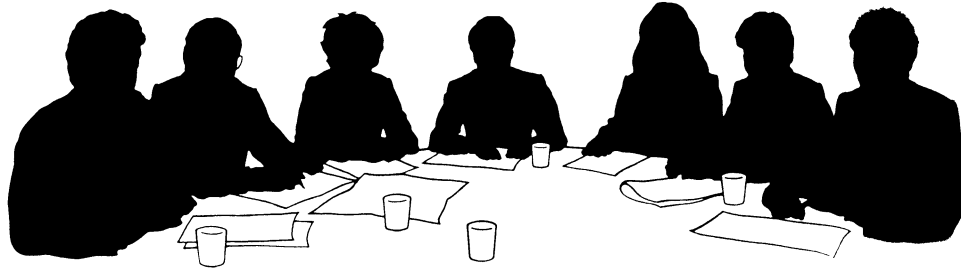
### Knowledge Exchange Group

Become part of CEAL's Knowledge Exchange Group, a network of professionals interested in generating, sharing, receiving and exchanging advanced-level information about membership-based organizations and association management. Participants are notified monthly of assessments, checklists, templates, and samples formatted in a PDF file and placed on CEAL's website.

Participation is open to everyone. The opportunity is available at no cost.



## Strategic Board Development: Checklist for Planning an Effective Orientation



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 interest. 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 information learned 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 Center for Excellence in Association Leadership (CEAL) 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 leaders 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.

#### 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 end 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.

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 training session (O)
- as an ongoing reference (R)

Add the appropriate code to the assessment in the “Status Format” 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 on-going reference throughout the year  
material that support the ability to be successful

#### STEP 5

##### **Create board development session agenda based on selected items and time allotment.**

Review those items selected for on-site presentation (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 CEAL 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.

#### STEP 7

##### **Target remaining selected items for future attention and plan reinforcement strategies.**

Make a 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.

#### 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 CEAL) 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.



# Strategic Board Development: Checklist for Planning an Effective Orientation

## 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 which items are relevant to your organization. Use this to establish a set of objectives that identifies what board members need to know or do, or behavior they need to exhibit.

Determine the optimum time and best method of sharing information by reviewing the checked items with a score of

3 or less. Choose the most appropriate time for each to be shared with board members by coding it in the "Format" column as follows:

- 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. (A PDF file also available from [www.cealweb.com/online.html](http://www.cealweb.com/online.html).)

Profession, Trade, Interest Awareness	Board's Level of Awareness					Status	
	Unaware		Fully Aware			Add	Format
<i>General Environmental Issues</i>							
economic, political, and social factors affecting members	1	2	3	4	5		
global issues affecting members	1	2	3	4	5		
<i>Legislative and Regulatory Issues</i>							
pending and emerging legislative issues	1	2	3	4	5		
pending and emerging regulatory issues	1	2	3	4	5		
relationships for advocacy with other groups	1	2	3	4	5		
allied relationships for legislative/regulatory support	1	2	3	4	5		
<i>Advancing the Profession, Trade, or Interest</i>							
research efforts	1	2	3	4	5		
setting/reviewing professional standards	1	2	3	4	5		
programs for product testing/endorsement	1	2	3	4	5		
certification/designation programs	1	2	3	4	5		
profession's code of ethics	1	2	3	4	5		
spokespersons for public policy and public relations	1	2	3	4	5		
Personal Leadership Competencies	Board's Level of Awareness					Status	
	Unaware		Fully Aware			Add	Format
building productive working relationships	1	2	3	4	5		
managing effective meetings	1	2	3	4	5		
negotiation/conflict resolution	1	2	3	4	5		
parliamentary procedures	1	2	3	4	5		
personal and professional goals	1	2	3	4	5		
ability to identify objectives from strategies and tactics	1	2	3	4	5		
policy development	1	2	3	4	5		
public speaking/motivational communication	1	2	3	4	5		
effectively recruiting volunteers	1	2	3	4	5		
reflective listening	1	2	3	4	5		
strategic thinking	1	2	3	4	5		

Organizational Awareness: Management and Governance	Board's Level of Awareness					Status	
	Unaware			Fully Aware		Add	Format
<i>Purpose, Direction, and Goals</i>							
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 plan	1	2	3	4	5		
governance policies and procedures	1	2	3	4	5		
organizational liability (unlawful conduct)	1	2	3	4	5		
<i>Roles, Responsibilities, and Expectations</i>							
incoming president's goals/expectations	1	2	3	4	5		
roles for volunteer leadership (oversight, policy development, etc.)	1	2	3	4	5		
volunteer leader organizational structure	1	2	3	4	5		
board of directors' 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		
<i>Management Overview</i>							
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 vehicles (mailings, website, fax)	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		
<i>Financial Overview</i>							
organization's budget	1	2	3	4	5		
budgets of affiliated groups (as 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		
<i>Membership Development Information</i>							
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		
<i>Miscellaneous</i>							
allied relationships (vendors, suppliers, etc.)	1	2	3	4	5		
affiliated relationships (components, foundations)	1	2	3	4	5		
recognition, awards, and scholarships	1	2	3	4	5		