

of interest, it is just as important that board (and committee) members know that their opinions have value and their work will be a meaningful contribution to the school community.

6. State of the school report.

Led by the administrators (pastor/principal/president), this should be a standard segment of each board meeting and serve as part of the ongoing orientation of board members. In 10 minutes or less the school administrators should describe highlights of both the school's greatest successes and challenges. This may lead to a discussion of the priorities that have been agreed upon by the person or group with the final authority.

7. End with a goal review and committee assignments.

An energizing way for the orientation meeting to close is with the acceptance of the top priorities broken down into action items to be accomplished by the various committees. This is a great opportunity to move the new group to action by providing every member with a committee assignment. An effective chair will first allow members to volunteer for a particular area, and talk with reticent members after the meeting. Committee chairs should be selected by the board or the board chair after consulting with others.

Be sure that board members know what resources are available to them, such as the Web pages, publications, and services of the NCEA Department of Boards and Councils and your arch/diocese.

8. Follow up with calls and thank you notes.

Soon after the orientation session, the board chair and/or principal could write brief notes of appreciation and place follow-up calls. Remember, you've covered a great deal of material and members will need to digest it. While a few will have questions on the night of the orientation, others will ask for clarification later—everyone has a different style. The administrator and chair should be ready to respond to a wide variety of queries. Some boards assign a veteran member to each new member as a mentor or to answer questions.

9. Orientation segments in future meetings

One shot is not enough. Segments at the beginning of meetings periodically can focus on specific topics. *The Board Member's Thumbnail Series* can be helpful for this purpose. A simple way to add an orientation component to each meeting is to hold meetings in different locations on the school campus. For example, a meeting in the library might generate a discussion on the size and scope of the collection, the changes in library science over the years, or the need to update library computers. Imagine what could come out of a meeting held in the boiler room! But be careful that this does not dominate the meeting.

A solid orientation will lead to a stronger, more effective board. These volunteers are a vital part of school leadership and will be better able to serve your institution if they have a clear understanding of their responsibilities and where they fit into the school community.

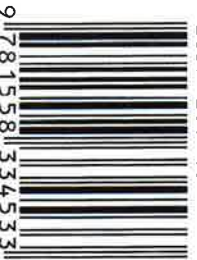
The Board Member's Thumbnail Series can be given to new board members and collected by members as a handy reference library. Some titles may be helpful to teachers or parents. They may be useful for 10-minute discussions at the beginning of meetings, or expanded for longer sessions.

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THE
BOARD*
MEMBER'S

SERIES

Conducting Effective Board* Orientation

Department of Boards
and Councils of the
National Catholic
Educational Association



*The word "board" always includes commission, council, and all other titles given to governance groups.

The administration and Nominating Committee have spent a great deal of time working as a team to identify suitable individuals to join your school's board, council, or commission. Great! Now the people have been gathered whose skills and expertise will lend support to focusing your school's mission, strengthening financial operations, and leading your institution to many more years of effective teaching in a Christ-centered atmosphere of love and compassion.

That's the good news. The challenge is to make sure everyone is on the same page. A formal orientation process is just as important to established governance groups as to emerging ones. Being intimately involved with a school, the principal, chair, president, or pastor sometimes forgets that others don't have the benefit of the information they have at their fingertips.

For example, would a board candidate—no matter what skills he or she may bring in the areas of marketing, financial management, facilities maintenance, or strategic planning—know the mission statement of your school or that it was founded by the Ursulines in 1893 or that your students represent over 40 different countries? When it comes to organizational details, does every member understand the nature of board governance in a *Catholic* school? Do they know whether they are a policy-making (limited jurisdiction) or an advisory board and the limits Canon Law places on their authority? How about mundane but vital tidbits such as contact information for the other board members, emergency contact or media spokesperson information, and the schedule of important school functions?

Built into each board's annual calendar should be an orientation—scheduled for early in the school year and supplemented by short follow-up segments frequently built into subsequent board meetings. This provides a solid framework for new members to understand expectations. It also guides all members to a better understanding of how they fit into the team; how much time they should commit to the effort; and how goals will be set, achieved, and ultimately evaluated. In no case should you push the responsibility off on them to just “pick things up” as they go along.

Who Organizes the Orientation?

Orientation of the board falls under the purview of the nominating committee, membership committee, or executive committee. If the board is new, the administration in concert with the chair (who also may need an orientation) must handle the orientation. Some boards call upon NCEA, arch/diocesan representatives, or leaders of well-established boards to assist with the orientation. Some dioceses provide an annual orientation day for all boards, which includes seminars on a variety of topics. While this is an important learning event, it cannot replace a local orientation. Your school is unique and you want its leaders to understand its special qualities, successes, challenges, and needs.

Steps to a Great Orientation

1. Give board members a packet of information about your school.

A Marketing Kit is a key resource in both the recruitment and orientation of board members. This should include current school brochures, a newsletter, a short fact sheet with student demographics, tuition charged as well as the *actual* cost of educating a child in your school, and general funding sources. This kit also can be a useful tool when board members approach potential donors.

Each board member also should receive a Board Member Kit before the orientation date. This kit should contain the history and mission of the organization, articles of incorporation and bylaws, board member job description, committee chart and descriptions, financial information, the strategic plan, and the book of policies. It also should include a roster of board members with everyone's term and contact information. You also might include minutes from meetings in the last year. Emergency contact information and contact information for the school spokesperson in time of crisis definitely should be included. A *Board Member's Prayer* and *Code of Ethics* are available from NCEA. With this kit, your board is well on its way to running smoothly and effectively!

2. Have students lead tours of the school.

At the beginning of each year all board members should be given a tour of the facility. This will provide an effective way to see the immediate needs of the institution as well as its greatest assets,

which include faculty and staff. Students are the best ambassadors for your institution. Tours led by students also provide a fresh and lively perspective that will engender enthusiasm.

3. Communicate effectively.

Perhaps the orientation will be your first board meeting of the year or part of a Saturday planning retreat. Some schools have a great idea of success holding it on a Friday evening, offering a light supper prior to the start of the meeting. Don't try to squeeze it into too short a time. The date must be communicated clearly to everyone. A letter might be written to each member, followed by an email reminder asking for RSVPs, and a telephone call to be sure the request has been received and the members understand how important their attendance is to the effort. (A great deal of time will be spent at the beginning of each year communicating with board members. Once everyone becomes comfortable with the chosen method of communication—email is fast becoming the most effective method—life becomes easier for everyone!)

4. Start with a prayer.

Remember, while board members often deal with practical matters, this is also a ministry. Reinforce this at the beginning of each meeting with a short prayer or reading (not always led by a priest or religious). This simple practice may be the greatest unifier and reminder of the mission of your Catholic school.

5. Roles and responsibilities of board members.

This is an opportunity to review expectations and bylaws, and discuss possible committee descriptions and needs. It is important to have members become familiar with items in the Board Member Kit such as policies; don't just let members “file” them. (Perhaps use 15 minutes at board meetings to review specifics.) A presenter from NCEA, the arch/diocese, or another strong board might be invited to share broader experience and a brief overview of key responsibilities. Segments from the *Building Better Boards* DVD may be shown if it is difficult to secure a guest speaker. While it is vital to cover crucial things like communication channels, accountability, authority limits, confidentiality, and conflict