

New Director Orientation

Who Does What ... and Why Bother?

by Martha Whitman

No one disputes that board orientations are important, but between director turnover and time consumed by regular board work, orientations are susceptible to inconsistent practices at best and benign neglect at worst. Establishing who's responsible for what is key in creating fruitful orientations that will survive the test of turnover and all the distractions inherent in board life.

Ultimately, all directors and the general manager are involved in new director orientation. All directors should be encouraged or required to attend—not only because they will learn something but also because orientation is essential for integrating new directors into the whole and modeling board culture. Compared to regular board meetings, the less formal nature of orientations

will allow for the development of good rapport between directors.

Yet the orientation session itself is neither the beginning nor the end of the orientation process. Your orientation will ideally begin within the nominations and elections committee. Imagine all the time and heartache saved if that committee spent time with potential candidates to weed out those who misunderstood the board's roles, responsibilities, and time commitment. A prospective board member might want to influence the co-op in a way that can't be properly achieved through board work, and it would be a service to everyone if this situation were recognized early on. The committee could achieve such clarity through one-on-one interviews, explaining the co-op's policy manual and bylaws,

and providing prospective board members with readings on co-op governance. And since nothing clarifies theory like practice, it also makes sense to ask candidates to attend a board meeting.

The rest of the orientation typically falls to the board development committee. If you don't have one, consider forming one, as there is a fair amount of work to be done, and it shouldn't fall on the shoulders of just one person. The beauty of utilizing such a committee is that its members can consider the big picture and coordinate various aspects of board training and development. The committee can plan the flow of orientations, retreats, and regional trainings and can continually call attention to resources available to directors, such as the *LEADer*, the CGIN listserv, and *Cooperative Grocer*



This article is excerpted from Issue #9 of the *LEADer* (Leadership Education and Development newsletter), published in fall 2010. The topic of this issue was new director orientation with other articles about planning an orientation for new board members, building board cohesion, and a list of potential topics to cover in an orientation. The study guide features an outline for an orientation and a table of contents for a board reference manual. Find the [full issue here](#).



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to give deeper context to the discussions that will inevitably occur during training? Is the co-op expecting significant projects, challenges, or opportunities that are best explained by the general manager? Depending on such variables, the general manager can provide continuity at orientations by handling the nuts and bolts, giving tours, or presenting agenda items. What you don't want to miss is the golden opportunity for new directors and the general manager to begin their professional relationship in the collegial atmosphere of an orientation.

Given that new directors will receive a lot of information over a short period, the orientation doesn't end at the conclusion

of the formal session. Some boards assign a buddy to each new director. The buddy should be available to the new director and ideally also check in with him or her. With each question asked, a great buddy looks for ways to broaden the new director's understanding of board work. Some boards have the president act as a buddy to all new directors. The president is a logical choice, since ensuring that all board members fulfill their duties and responsibilities falls within his or her job description, but it's helpful to periodically review whether having the president perform this task is the correct decision. The president might already have enough on his or her plate, and someone else might be better

suited and ready and willing to track the integration of new directors.

If you look beyond the titles of nominations and elections committee, board development committee, general manager, and administrative assistant and simply identify their potential roles in creating an orientation program, your team can organize itself to fit your circumstances and can cogently present all the elements of a comprehensive orientation. The event needn't be burdensome. In fact, it can be one of the more meaningful activities of board service. The orientation will allow you to build a strong leadership team that will outlast any one person's tenure. For your co-op, this will be a legacy of immeasurable value.