

Essay Title: Board Orientation 101

Audio Essay: Disc 2 track 17

We've all had the experience of walking into a room where a conversation was in progress. We were able to understand a little of what people were saying, but a lot of references went over our head because we didn't have the benefit of what had gone on before.

It can be like that if you're a new member of a church governing board, but haven't had the benefit of a proper orientation.

"I've been there," says Lynda Bluestein, of Fairfield, Connecticut. "You find yourself part of a stream that's already flowing, but it's not always clear how you fit in. I've had people tell me it took them two years to catch onto what was going on. Well, on most boards I've been on, that's too much time to waste." After one experience with a board that got off to a slow start, Bluestein created a process to quickly and comprehensively orient new members of the boards she serves on.

She is former president of the Unitarian Universalist District of Metropolitan New York and past president and secretary of the UU District Presidents Association. She says, "It's the first responsibility of leadership, to welcome and to properly orient those who are going to join you in the task of leading. To not do that is like inviting someone to cook a meal in your kitchen without telling them where things are or how to turn on the oven."

Bluestein believes in holding a retreat for any new board as soon as it is convened. The retreat covers the board's history and where it is going. She says, "These retreats place us in time and connect us to one another." Each board member gets a binder with policies and procedures, and a description of current and past projects.

Bluestein says that at the first board meeting it's important to lay out the complete year's agenda, as far as it is known. "In that first meeting in the summer," she says, "I tell them where we want to be by the time of the annual meeting in April." Certain items, she notes, have to be dealt with at a certain point in the year. For instance, if awards are going to be presented in April, then discussion on them should start in January.

Every board member also gets a list of responsibilities, an explanation of how meetings are conducted, and information on where to go with questions.

Qiyamah Rahman, former district executive in the Thomas Jefferson District, has created and compiled a comprehensive collection of documents about "Building Effective Boards in UU Congregations." The documents include Board Orientation 101, Board No No's, Board Culture, and Board Retreat. She also recommends holding a formal installation of board members. She says, "A ceremony really brings home the importance of board work."

At Cedar Lane UU Church, in Bethesda, Maryland, new board members are oriented in four ways. First the board chair calls a meeting of just the new members to talk about the board and to answer questions. Then, each July, there is a retreat for the full board to educate members about how the board and congregation operate, to build relationships among members, and to set goals for the year.

Thirdly, each member gets a "board book" with policies of previous boards, by-laws, and committee charters. And finally, says the Rev. Roger Fritts, "We also encourage board members to attend district and UUA events. For example, I have offered to pay the way for any board member who is willing to attend the Large Church Conference."

The Rev. William Zelazny, district executive for the UUA's Ballou Channing District, recommends giving new board members a tour of the campus. "Surprisingly," he says, "some have never seen all of it. It's also a good time to talk about maintenance and capital improvement issues."

Zelazny recommends scheduling a time when more experienced board members can tell new ones what they learned, what was different than they expected, and what they would have done differently. Orient members on how to use the copier and how to request help from the clerical staff. At the first meeting, have the board members each answer why they agreed to serve, what their major goal is for their term, what their time limitations are, their major fear, and their major hope for the congregation.

Robin Scheu, of Middlebury, Vermont, helps train nonprofit boards and has worked with UU congregations in board training and policy governance work. “If boards are not focused,” she says, “they have a hard time discerning their business from that of the staff; they may micromanage. I was at a board meeting once where a board spent 20 minutes discussing the length of the service agreement for the copier. That’s not a board decision. The board’s role is to set the direction, but then let the staff decide how they are going to get there.”

Scheu adds, “Often boards are unclear what their role is. Their role is to articulate the vision, getting input from lots of sources, and then saying what results or outcomes they want to have.”

She adds that board members should understand that they represent the whole membership, not a particular constituency. They should support the board’s final choice, and not bring hidden agendas. “Board work is really brain work,” says Scheu. “It’s deep conversations and includes getting information from many places. It can be exhilarating work if we let it.”

For more information and resources, go to: uua.org and click on Leaders

Resources

Contact your district executive or consultant for resources about board orientations and organization.

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