

Board Orientation

BOARD ORIENTATION is the process to inform directors of their roles and responsibilities. Ultimately, the board is responsible for the organization. A good orientation begets good board members --- plan it carefully.

Without orientation, directors may have misconceptions or not understand their roles. While some boards feel an annual orientation might be excessive, the yearly discussion highlights organizational changes, increased expectations on boards, and focuses on goals and programs of work.

Orientation can be delivered in a morning or afternoon session, or may include a multi-day retreat.

The executive director and senior board members should be involved in planning and delivery.

Use legal, insurance and accounting experts for additional speakers.

Include the entire board and consider inviting committee chairs and prospective leaders.

Divide the information into four parts: (1) about the organization, (2) board roles, (3) risk management, and (4) strategic direction.

New directors will appreciate a special invitation to the offices or a visit with the CEO to ensure they have an understanding of the organization.

Supplement orientation with a leadership manual that includes the information volunteers will need for a successful year --- including advice on antitrust avoidance, rules of order, conflicts of interest, public documents, budgets, strategic plan, etc.

Resources: ABC's of Parliamentary Procedure by Channing Bete; Board Responsibilities laminated guide by Bob Harris, CAE; and The Perfect Board book by Cal Clemons, CAE

Orientation



- 30% - About the Organization
- 30% - Board Roles
- 15% - Risk Management
- 25% - Strategic Direction

Document Reference File

- Bylaws
- Code of Ethics
- MLS Rules & Regulations
- Computer Training
- Indoctrination



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