

## GUIDE FOR BOARD ORIENTATION

Every League board should schedule an annual board orientation meeting. A thorough orientation gives new board members greater confidence in carrying out their responsibilities and minimizes problems for the board later on. Provide this orientation with local League experienced personnel, or request the state League liaison or membership vice president to assign a trainer to lead the discussion.

Plan to hold the board orientation as soon as possible after the new board is formed. See that board members have the files and tools of their predecessors and that they look at them before the meeting. Each should also have League Basics (*In League*(LWVUS), appropriate information from this *In League in New York State: A Guide to Managing Local Leagues, For the New (and Not So New) Board Member*, and a copy of *Welcome to the League* (LWVNYS).

### POINTS TO BE COVERED

- I. Nonpartisan Political Policy (Bylaws: Article II, Sec. 2)
  - A. Discuss why it is necessary
  - B. Review League Basics and section dealing with nonpartisanship in *In League in NYS*.
  - C. Review current policy
  - D. Discuss responsibility of board members to bring problems of individual nonpartisanship to board
  
- II. The Role of the Officers
  - A. The president
  - B. The vice-president
  - C. The secretary
  - D. The treasurer
  
- III. The Role of the Board - a board member's twofold responsibility
  - A. Total board responsibility
    1. To advance League goals
      - a. Voters service/citizen information
      - b. Program - study, discussion, consensus, action
    2. To plan and guide League policy
      - a. Set goals and priorities
      - b. Schedule activities (calendar planning)
      - c. Make all policy decisions
      - d. Approve plans of committees
      - e. Review and evaluate
    3. To promote membership growth and involvement
      - a. Provide variety of opportunities for participation (spot jobs, study groups, action campaigns, administrative committees)
      - b. Provide oversight and assistance in recruitment and orientation
      - c. Be certain the year's activities will provide a satisfying membership experience
    4. To manage finance matters and keep the League fiscally sound
      - a. Help plan and assist with finance drive (both member and community)
      - b. Watchdog monthly expenditures and income
      - c. Know what the budget allocation is for portfolio
      - d. Meet state and national (and ILO, if applicable) PMP obligations
    5. To determine consensus
      - a. Role of committee
      - b. Role of board

- B. Individual Portfolio Responsibility
  - 1. Form a committee
  - 2. Pre-plan with committee
  - 3. Present proposed plans to board
  - 4. Give periodic progress reports to board
  - 5. Carry out board and membership decisions
  - 6. Be up-to-date on publications in the field
  - 7. Keep a notebook or file for present use and future reference. This should include job description, plans, reports and action, and other materials which facilitate turning over of portfolio to a substitute or successor

IV. Board Meetings

- A. Written agenda, with estimated timing, sent out ahead of meeting
- B. Parliamentary or at least business-like procedure
- C. Importance of attendance or proper notification if knowing you will not be able to attend
- D. Full discussion and consideration of all proposals
- E. Policy-making and exchange of information. No committee work
- F. Full minutes taken for reference
- G. Begin and end on time
- H. Clear assignment of responsibility
- I. Evaluation of League activities

V. Interrelationships

- A. Among neighboring Leagues—program cooperation, shared administrative jobs, possible examples being joint bulletins, fund raising, voters service and publications ordering.
- B. Between local, ILOs (where they exist), state and national boards
  - 1. Sending in bulletins, bylaws and program proposals
  - 2. Suggesting candidates for nomination
  - 3. Sharing information and techniques
  - 4. Attending national and state conventions and council
  - 5. Asking for assistance with problems and concerns