

## Orientation Pop Quiz

“Knowledge is power;” no phrase is truer for association volunteers. By providing information at the start of their terms, directors become more effective leaders.

The knowledge transfer often takes the form of an annual orientation conducted at, or before, the first meeting of the newly elected board. Orientation can range from a relaxing weekend retreat with time for problem solving, to an hour squeezed before a board meeting. Leaders receive a presentation on topics ranging from antitrust to UBIT in order to better understand and govern the organization.

### **Orientation Manuals**

A leadership manual complements the orientation process. With the amount of content, manuals can be 100s of pages, including bylaws, articles of incorporation, calendars, rosters, strategic plan, and budget, for instance.

Technology allows for alternative delivery of orientation information. All the information can be distributed on a compact disc or posted on the organization’s website with password protection. Both allow for easy updates by staff, eliminating the costs of notebooks, copying, assembly and shipping.

### **Examples Make Orientation Real**

Use headlines to bring the information to life. If you’re discussing reimbursement policies and the importance of receipts, share a story about how an association’s budget went awry because receipts were lost, officers neglected to submit timely expense reports and the membership eventually claimed “misuse of funds.”

Use cases to explain concepts such as apparent authority and antitrust. There are plenty of legal examples of how organizations have been accused of antitrust violations because of acts such as member expulsion, standard setting, and price discussions.

Encourage plenty of discussion. The exchange of information among volunteers results in better understanding and new ideas for the organization.

Include staff at the orientation so volunteers can put faces with names and responsibilities. Staff members are the primary resources for the volunteer leaders.

### **Include an Orientation Pop Quiz**

Use a quiz to enliven orientation, with all answers to be found in the information distributed. These questions will help you assess how much leaders know about the association.

1. You are asked to address a local civic organization about our profession and association, where can you find the mission statement?

2. You learn that a member has allegedly violated the association's code of standards, and other members keep bringing it to your attention, where can you find information on a fair process for handling?
3. A member shows interest in a leadership role and then asks about the kinds of insurance carried by the organization. Where can you find insurance information in your orientation materials?
4. You attend a meeting where the discussion departs from the agenda and moves boycotting a supplier; what information can help you squelch the conversation and explain the rationale?
5. You see the opportunity to engage more volunteers by appointing an ad hoc and standing committee. Where do you find information about the association's committees and who appoints them - without calling staff?

### **Orientation Answers**

1. Before making a speech or doing an interview, refer to the association's mission statement. You'll find it in the organization's strategic plan or a similar statement in the preamble to the bylaws.
2. Check the bylaws regarding processes dealing membership qualifications, nonpayment of dues and expulsion for cause. Especially note the requirements for notice, a fair hearing and appeals. Use extreme caution in taking any action or making an allegation, and be sure to use staff and legal counsel.
3. One way to ascertain information about insurance is by checking the budget. The line item for insurance will reflect budgeted amount; and in some financial reports the types of coverages are listed, such as D&O, meeting cancellation and general liability.
4. Antitrust violations are of concern for many associations and should be avoided at all costs. The orientation information includes an antitrust statement that directors receive and sign each year. In addition, refer to the Risk and Liabilities section for tips on managing and reducing risks. You should also be aware of the state and federal volunteer immunity laws described at the orientation.
5. Standing committees are identified in the bylaws, as well as who appoints committees and their composition. A committee roster is available to identify the standing, ad hoc and task force committees. Finally, committee administration is described in the policies and procedures manual.