When I became the acting president of Hamilton College in 1999, I already knew a lot about the college. I am a 1996 Hamilton graduate, the parent of a former student, and I have served for 12 years on the college’s governing board. Still, when Hamilton President Eugene Tobin took a much-deserved sabbatical, I learned more about Hamilton during my six months in the presidency than in all my previous time associated with the college. Much of what I learned will make me — and, I expect, my fellow board members — better in the future.

An unusual level of alumni involvement distinguishes Hamilton. Typically, more than 55 percent of alumni contribute every year to the annual fund, and more than a third volunteer to recruit students, raise funds, counsel undergraduates about careers, provide internships, conduct alumni events, and participate in other activities. As is the case at other colleges, Hamilton’s board sets the tone for financial and volunteer support.

Yet despite this high level of alumni involvement and my own active participation with my alma mater, I had a superficial understanding about many important facets of the college and wondered whether my fellow board members did as well. Naturally, I recognize it is unrealistic to expect that board members who typically visit the campus just three or four times a year will ever have the same breadth and depth of knowledge as the president and senior administrators who are charged with the daily operations of the institution.

A New Understanding of the College

Soon after I became president, the impact of policy decisions became clear to me — much more so than when I was a board member. For example, deciding to admit an additional 20 to 30 students from the waiting list or planning for a larger class, though attractive from a financial point of view, had significant ramifications in the day-to-day life of the campus. Admitting more students means hiring more staff members. Where would we find additional housing? And if the new hires were adjuncts, how could we be certain they would be as qualified and as committed to the institution as full-time faculty members? This level of detail rarely makes it to the boardroom, but as president, I could see how a tempting financial solution might create an irritant in campus life.

My experience as a college president has made me much more aware of the nuances of board decision making. Many issues that boards are asked to consider require much broader scrutiny. Switching roles for six months taught me five fundamental lessons that may help boards and board members become more effective.

1. Balance the membership of board member committees.

Hamilton’s board of directors, like many governing boards, consists disproportionately of business executives, investors, and successful entrepreneurs. Their acumen is in finance and in running a business, so they tend to be most interested in the issues — fund-raising, endowment performance, and investments — with which they are most familiar and where results are tangible. They tend not to be so comfortable with the other components that make a college successful such as its staff, programs, and facilities.

The tendency among board members to gravitate toward finance is understandable. After all, board members have a fiduciary responsibility to the college, and given today’s fiscal pressures, no board can be blamed for being preoccupied with an organization’s assets. But a balanced budget and a growing endowment are only two measures of an organization’s health.

It is equally important that all board committees have the appropriate firepower if the mission of the institution is to be fulfilled. The committee on board members should look carefully at the distribution of talent and influence among the various standing committees to ensure that every function has an important voice at the boardroom table.

2. Seek, within limits, close encounters with leaders of the organization.

In my six months as president, I met and spent time with most of the faculty, the swimming coach, the chair of the chemistry department, the director of the career center — people board members typically would not encounter. Yet the insights and opinions of such individuals can give board members a much broader understanding of an institution.

Recognizing this untapped resource, we restructured board weekends at Hamilton to facilitate even greater informal interaction between the board and various college
Few board members can claim to have been born with the natural aptitudes needed for their position. Some can state with confidence that they’ve gained most of their knowledge by educating themselves, serving on other boards, and successfully applying their specific expertise to their governance duties. But no potential board member can declare ahead of time that he or she will be the perfect member for a particular board before having an opportunity to interact with peers and see the full board in action.

Every board has a culture that is defined by its customs, traditions, and practices. Every new board member needs an introduction to that culture — not just the ability to meet the general expectations placed on individual board members.

**Why board orientation?**
Every board member candidate has a right — and should demand the right — to learn what he or she is getting into ahead of time. Orientation can be many things for the board member: an initiation to board service; an introduction to the organization, its mission, and programs; clarification of future time and financial demands; an opportunity to get to know other team members; and a chance to form an educated foundation for the coming years on the board. For the board, orientation is a chance to speed up the learning curve of new members and get them quickly engaged in the board’s activities. It ensures that every member is functioning within the same framework and with same instructions. Orientation benefits the board as a team by providing an official launch for new partnerships and relationships.

**Appropriate settings**
Some boards organize a full retreat — lasting several hours to more than an entire day — to cover all aspects of orientation. This approach may be too demanding for some boards whose members are spread nationwide and who already commit themselves to attending regular board meetings. Additionally, for any board, it may be information overload in a too-short time span.

Dissecting the curriculum and goals of the orientation beforehand can properly facilitate the delivery of information, use everyone’s time effectively, and share the duties more evenly. As a result of cultivation, for instance, a candidate should already walk away with a firm understanding of the organizational mission and how he or she can help advance that objective. New board members should be expected to read the board handbook during their own private time, not in the meeting room. The core orientation meeting, then, can become a setting where old and new members get to know each other, key issues are covered in detail, and question-and-answer sessions clarify additional areas of concern or importance. The first board meeting later will officially indoctrinate any newcomers to regular business.

**Participants**
Naturally, the primary recipient of orientation education is the new board member. All new members should participate. Every current board member has a role in orientation as well, whether to function as a mentor, represent the diversity of the team to the newcomer, make a presentation, or just get to know the new member(s). If the board organizes separate sessions for different aspects of orientation, it may not be necessary for every single board member to attend every session. No matter how engaging the program, going over the same history and documents on a regular basis can become an unwise use of members’ time.

The chief executive plays a key role in the success of the orientation. The chief executive is the person most knowledgeable about the organization and thus the perfect person to share this information with new board members. The chief executive usually guides the staff to organize the logistics of the meetings.

The board may decide to engage a facilitator to conduct the sessions — both so that all participants may contribute freely without other obligations, and to bring in an unbiased and professional approach to presenting information. Outside guest experts may be invited to contribute additional perspectives to specific discussions.

**Effective tools**
To turn orientations into effective training sessions, follow these guidelines:

- Bring the right people together. Expect everybody to attend assigned sessions. Help everyone get to know each other.
• Create a conducive atmosphere. Bring informality to your ‘classroom.’
• Choose different modes to get your message across and to address certain issues (facilitated discussions, small group exercises, case studies, etc.).
• Manage expectations. Be clear as to why everyone is in the room and what they are supposed to get out of it.
• Choose the right focus. Concentrate less on the organizational details and more on how to be a good board member.
• Discuss team work. Boards are teams, and only as a body can the board make decisions.
• Incorporate the social side of board work already in the orientation process. Board members are often busy professionals and want to find an enjoyable professional setting for the retreat. Collegiality facilitates effective communication.
• Give homework. Orientation is just a beginning; show board members how they can build on what they just learned.

References
The Board Building Cycle
Available at www.boardsource.org or by calling 202-349-2500.