

“I WASN’T AWARE OF *THAT!*”

...THE IMPORTANCE OF TRAINING YOUR BOARD MEMBERS

by Jonathan Roberts

My friend Judith is a smart, highly capable professional in the investment industry. She is a long-time contributor to several not-for-profit boards. She recently told me that in her first role with a board, she was given no information or training when she joined. It took her 6 months to know enough to be able to contribute effectively at board meetings and her term was only one year!



Every successful organisation is supported by a strong board. A strong board knows what it is doing. In order for a board to know what it is doing, board members need education and training.

Training ensures that new board members can start making a contribution immediately.

Training is a simple and cost effective way of ensuring effective, responsible governance.

But many not-for-profit organisations don't realise this. Why not? They believe training is unnecessary because their board members are well educated, articulate and well organised. "It will come with time. All we have to do as board members is to listen, debate and decide – right?"

Correct, as far as it goes, but more skills are required in order for the board to act as a board. An effective board needs to act as a cohesive unit.

A board is made up of a number of individuals whose terms of service are shorter than the lifespan of the organisation. Effective, responsible governance requires that the knowledge accumulated by the board as a whole be distributed to new members as they join the board.

The overall goal of board training is to allow the board to be clear about its obligations and carry them out in an efficient and effective manner. This means respecting the time involvement of all board members, and getting new board members up to speed as quickly as possible.

Training also ensures that new members are aware of the mission, the history, the bylaws and the policies of the organisation they are governing. Ignorance of this information could prove damaging to the organisation if overlooked when approving a new motion. A well designed and implemented training program will go a long way toward effective risk management.

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A good board training program takes account of four elements:

- The three stages of board training – Trefasi Method™
- Content
- Frequency
- Delivery mechanisms

A training program is goal-driven and operates within specific constraints. The constraints are determined by the nature of the organisation and its board.

The Trefasi Method - board training in three stages

The Trefasi Method is a board training technique that is built on the three stages at which a board member needs training. The first stage is delivered prior to a new member joining the board. Prospective candidates need information to help them understand more about the organisation and the expectations that will be placed on them as board members. At this stage the goal is to use information and education to recruit effectively.

The second stage is training for new board members. At this stage the goal is to get new members up to speed quickly, to allow them to start contributing early in their tenure.

The third stage is continuing education for existing board members. The goal for third stage training is to keep board members stimulated, knowledgeable and to prepare them to take on roles with greater responsibility.

Stage 1 – Information Package for Prospective Board Members

Member turnover is a major problem for many boards. It is much more effective to eliminate candidates in advance than to deal with resignations from board members who find that they cannot commit the necessary time.

An information package should be provided to all prospective board members. This information forms the first stage of the board training.

It should include publicly available information about the history and mission of the organisation and specific information about the board's expectations of its members. It should give candidates a clear idea of how they can contribute to the advancement of the organisation, and why they would want to do so. It should be designed as a recruiting tool for new members and should be targeted specifically to the ideal candidate.

Stage 2 – Training for New Board Members

Stage two training builds on the introductory information provided in stage one. Board members who have completed stage two should be familiar with the organisation's expectations of board members and the roles and committees available to them. They should also have a clear idea of the

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board's governance process and the bylaws and policies that support this process.

Some organisations provide new board members with a three-ring binder of information when they join. This is a good idea, but it is not a training program. Reading a binder is a difficult way to learn. Many board members will not read the information. They need a more digestible form of learning.

Stage 3 – Continuing Education for Experienced Board Members

Stage three training should be designed to benefit both the member and the board as a whole. It should provide education on specific topics that are relevant to all board members. Topics such as governance, legal liability, stakeholder communication, and strategic leadership fit into this category. It should also provide learning that allows board members to take on increasing responsibility. Role-based topics such as managing committees and chairing board meetings fit into this category.

Third stage training differs from the first two stages in that it is more generic rather than specific to the organisation. Stage one and two training must be provided by the organisation because this knowledge is unique to the organisation.

Third stage training can be partially or entirely outsourced. It should provide the opportunity for board members to interact with their peers at other organisations as this is an important part of the learning process.

Content

What should training include? Board education should start with the expectations the organisation has of its board members. Once they understand these obligations they need both introductory training and some form of continuing education.

Stage 1 – Expectations

Expectations are included in Stage One training. Board members and prospective board members need to know up front the requirements of the job. What level of competence? How much participation? What sort of participation? If your board policies address these issues then make certain that your policies are supported by your training program.

Expectations cover two areas. These are selection criteria and contribution criteria.

Selection criteria are those criteria that prospective board members must meet prior to joining the board. Do you expect your board members to have experience serving on similar boards in the past? Do you expect your board members to be made up of “professionals” like lawyers and accountants or do you need a broad range of interested individuals who bring a variety of experience to the table? Remember that a high-profile professional may

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bring less to the boardroom table than a community member who has direct experience with the organisation's mandate. The starting point for a board member's job is a willingness to connect with the people on whose behalf the organisation exists. Are the people you select willing to spend the time to do this?"

Selection criteria may also include a obligation to complete some form of training prior to joining the board. For example, a Policy Governance based board might require board members to complete a basic introduction to Policy Governance. Visit <http://governancecoach.com/Default.aspx?tabid=328> for an example of a simple introduction course.

Contribution criteria are the contributions that a board member must make while on the board. These might include attendance criteria, committee participation, board education, responsibilities in connecting with the organisation's community to gather information, and, in the case of a working board, operational responsibilities.

Stage 2 – Introductory Training

The introductory training program is stage two training. This provides for a knowledge transfer of current, relevant information to new board members. Even seasoned board members with experience on other boards require orientation to the particulars of your organisation and the specifics of how your board operates.

Stage 3 – Continuing Education

In terms of continuing education, consider the makeup of your board. How much available time do the board members have, or how much time are they willing to devote to ongoing training? Also consider resource availability in your area – the United Way offers a great variety of continuing education for board members. Check out “United Way Organisational Capacity Building Training Courses” in your area.

Frequency

Stage 1 Training – Information Package for Prospective Board Members

Prospective candidates can appear at any time. Therefore the stage one information package must be available at all times; at a minimum on the organisation's website, and also as a take-away at organisation headquarters if the entity has a bricks and mortar presence.

Stage 2 Training – Training for New Board Members

Board training should be offered on a predefined schedule. The appropriate frequency of training opportunities depends on the expected term of service for board members. Mentoring should be provided to new board members immediately, with training following no later than 3 months into their term.

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If there is significant turnover every three years and nothing in between, then stage two training need only be offered every three years. If there is turnover every year, then stage two training is required on an ongoing basis.

Stage 3 – Continuing Education for Experienced Board Members

How frequently should board members update their training? Stage three training should be offered as frequently, and on as broad a range of topics, as the board's resources allow.

Delivery Mechanisms

How should training be delivered? Paper-based, electronic documents, web-casts and one-on-one mentoring are all valid forms of knowledge transfer. Board demographics play a role here. Younger board members who have grown up with computers and cell phones may find electronic and web-cast based training more viable options than will older members. Some members will read documents on line while other members prefer print.

It is an obligation of the board to provide for the future. In order to continue to move forward, it is imperative to attract fresh, young recruits. It is easier if you speak their language, the language of technology. Web based training, web casts and down-loads make information sharing easy and allow users to learn on their own schedules. Training programs that include input from a wide variety of professionals create a more interesting learning experience for board members of any age.

Monitoring as to completion and testing for understanding can and should, be built into these programs. Recognition is also important- particularly for younger board members. This can be built into an online training program and shared with fellow board members.

Another consideration is staffing levels. If staff is available, they can prepare paper-based training materials for each member. If resources are limited, it is best to have this available via the internet so users can self serve.

Member location is an important consideration in training delivery. Some very effective national organisations have members in a variety of locations. Internet and conference call delivery mechanisms are the only methods which allow these organisations to function.

Facilitated group training is an option if board members are located close enough to meet in person. This could be an onsite at the beginning of a board meeting, a hosted offsite retreat or a seminar. An offsite retreat is generally more intensive and can cover more ground than a thirty minute presentation at a meeting. Your facilitator could be an experienced board member or a professional depending on the topic under discussion. Keep in mind that good board communication requires a personal relationship between board members. In-person training is a good way to build and foster these relationships.

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What about mentoring? Pairing new board members with a more experienced member is an important supplement to formal training. This can be facilitated both in person and via telephone & email. The important thing here is that there is an open and available channel for the novice.

Consider too, the value of peer mentoring across organisations. Peer groups are a valuable opportunity for board members to share experiences and knowledge with their peers from other organisations.

Conclusion

Training is a critical part of good governance. The purpose of board training is to allow the board to govern in an efficient and effective manner.

A good training program takes account of four elements. The first one is the three stages at which a board member needs training: prospective, new and experienced. The Trefasi Method is a board training technique that is built on these three stages.

The last three elements apply to each stage of training: content, frequency and delivery mechanisms.

By careful consideration of the four elements, a board can assure itself that the knowledge and experience of its current and past members will benefit the organisation for the future and will provide a sound basis for effective and responsible governance.

Jonathan Roberts is a long time board member and a partner with Zzeem. Zzeem helps organisations develop and deliver education & training programs. <http://www.zzeem.com/>

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