ONBOARDING AND ORIENTATION ANALYSIS:
CHARLOTTE REGIONAL VISITORS AUTHORITY
BOARD OF DIRECTORS

University of North Carolina at Charlotte
Gerald G. Fox Master of Public Administration
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ONBOARDING AND ORIENTATION ANALYSIS: CHARLOTTE REGIONAL VISITORS AUTHORITY BOARD OF DIRECTORS

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UNC CHARLOTTE
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Executive Summary

The Charlotte Regional Visitors Authority (CRVA) is a public authority in North Carolina established under the Charter of the City of Charlotte (CRVA, 2020). It manages Charlotte’s public assembly facilities (Charlotte Convention Center, Spectrum Center, Bojangles’ Coliseum, Ovens Auditorium, and NASCAR Hall of Fame) and promotes the region as a destination for tourists, special events, and film and television production (Visit Charlotte and Charlotte Regional Film Commission).

A 13-member board of directors, in partnership with the chief executive officer (CEO), is responsible for ensuring CRVA fulfills its legal and fiduciary responsibilities to Charlotte’s residents. In an ongoing effort to strengthen the capacity of its board of directors, CRVA asked students in the Gerald G. Fox Master of Public Administration program at the University of North Carolina at Charlotte (MPA team) to evaluate its current new board member onboarding and orientation process.

New board member orientation is one part of a larger onboarding process. An effective onboarding process has short-term and long-term benefits for both new board members and the organization, such as increased productivity (Denny, 2015). New board members must first understand their role on the board through onboarding and orientation to become effective board members.

Methods

The MPA team utilized three data collection methods to establish its findings and recommendations:

- conducted an extensive literature review of orientation and onboarding trends and best practices,
- interviewed current CRVA board members and select senior staff, and
- interviewed peer organizations to benchmark current practices.

The MPA team used these data sources to develop findings, which fall into the following key themes: Onboarding, Orientation Content, Orientation Participants, Orientation Setting, and Orientation Duration.

Findings and Recommendations

The sections below provide brief descriptions of the themes and corresponding recommendations.

Onboarding: Onboarding is the process where organizations welcome, inform, and guide new members as they work to acquire the knowledge and skills to competently fulfill their responsibilities (Klein & Heuser, 2008; Klein et al., 2015). The amount of time it takes for an individual to transition into an effective board member varies on the person and the organization. The onboarding process may last anywhere from months to one year, but it does not start and stop with the orientation. Additionally, activities before and after the orientation may help ensure the organization welcomes and supports new board members as they begin their board term (Klein & Heuser, 2008).

Orientation Content: The main goal of a new board member orientation is to inform board members about the organization, their roles and responsibilities as board members, and the legal and financial environment the organization operates within (Klein & Heuser, 2008). Orientation must strike a balance between providing board members with essential information without overwhelming them with content (Levinson et al., 2018), as well as preparing new board members to participate in and effectively fulfill their board duties (Patton, 2018).
**Orientation Participants:** Participants in the orientation may be newly appointed board members, previously appointed board members, the CEO, key staff, and others with relevant expertise.

**Orientation Setting:** The space where an organization hosts its orientation can be meaningful for new member’s retention of information (Romano & Nunamaker, 2001). The atmosphere of the orientation should be conducive to learning and provide new board members with an environment that allows them to focus on the orientation materials while building relationships with other board members (Kleinsasser, 1995).

**Orientation Duration:** The length of an orientation varies depending on the content and needs of the organization. When considering the duration of orientation, organizations must also consider the complexity of the material covered. While the duration of the orientation should take into account the board member’s busy schedules, covering too much material in a short amount of time will leave board members confused and overwhelmed (Levinson et al., 2018).

The MPA team identified trends and best practices for new board member orientations within each of these themes. The MPA team used this data to develop recommendations for CRVA (Table 1).

**Table 1**

<table>
<thead>
<tr>
<th>Recommendations for CRVA</th>
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<tbody>
<tr>
<td><strong>Themes</strong></td>
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<td>Onboarding</td>
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<td>Orientation Content</td>
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<td>Orientation Duration</td>
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CRVA has effectively used orientations in the past to acclimate new members onto the board. Incorporating these recommendations into its current practices will likely amplify results and increase the overall effectiveness of its board.
Introduction

The Charlotte Regional Visitors Authority (CRVA) is a public authority in North Carolina established under the Charter of the City of Charlotte (CRVA, 2020). It manages Charlotte’s public assembly facilities (Charlotte Convention Center, Spectrum Center, Bojangles’ Coliseum, Ovens Auditorium, and NASCAR Hall of Fame) and promotes the region as a destination for tourists, special events, and film and television production (Visit Charlotte and Charlotte Regional Film Commission). Additionally, CRVA is a key partner in the region’s destination marketing project to create a cohesive brand for Charlotte and merge its visitor economy with its economic development.

In an ongoing effort to strengthen the capacity of its board of directors, CRVA asked a team from the Gerald G. Fox Master of Public Administration program (MPA team) to evaluate its current board member onboarding and orientation process and present recommendations to improve it. The MPA team studied literature and trends in the field, reviewed current orientation materials, and interviewed current board members, CRVA staff, and peer organizations throughout the United States. After completing this analysis, the MPA team generated 15 recommendations to expand and strengthen the onboarding process for CRVA’s new board members.

The following section provides a brief overview of the role of governance boards and discusses the importance of orientation and onboarding. This report then describes the data and methods used for this project. Finally, the report provides a set of recommendations for CRVA aimed at achieving a more effective orientation to acclimate new members quickly and effectively. The recommendations fit into the following themes: Onboarding, Orientation Content, Orientation Participants, Orientation Setting, and Orientation Duration.

CRVA Board of Directors

Board members are essential to safeguarding an organization’s well-being. At a minimum, each board member is responsible for ensuring the organization fulfills its legal and fiduciary responsibilities (Price, 2018). However, organizations often seek individuals who are willing to go above and beyond expectations to serve on their board of directors. This means organizations need to recruit individuals committed to directing the mission, vision, and policies, as well as protecting and enabling the organization to operate efficiently and effectively (see Figure 1). Board members also bring their expertise and unique perspectives to the organization, as well as serve as advocates for support of the mission (Aligned Influence Consulting, 2020).
Figure 1  
*Responsibilities of Effective CRVA Board Members*

<table>
<thead>
<tr>
<th>Responsibilities of Effective CRVA Board Members</th>
</tr>
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<tbody>
<tr>
<td>Ensure financial sustainability</td>
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<tr>
<td>Direct mission, vision, and policies</td>
</tr>
<tr>
<td>Protect the organization and their policies</td>
</tr>
<tr>
<td>Enable staff and policies to work effectively</td>
</tr>
<tr>
<td>Resource development and advocacy</td>
</tr>
</tbody>
</table>

**Aligned Influence**

The foundation for CRVA’s framework of board responsibilities is Aligned Influence, an integrated model of organizational governance that defines key roles for board members and the chief executive (Aligned Influence Consulting, 2020). This model explains three key roles for both the board of directors and the executives of the organization. Under these roles, board members direct, protect, and enable the organization, while the chief executive leads, manages, and accomplishes the work of the organization (see Appendix F for more information on the Aligned Influence model). Aligned Influence governance involves a four-step process: checking alignment, getting aligned, staying aligned, and driving effectiveness. This four-step process is used to guide aligning both model and governance. CRVA has further defined responsibilities for the board of directors, executive team, and staff using the Aligned Influence model, clarifying the difference between staff and board responsibilities.

**Onboarding and Orientation**

To ensure new board members acquire the knowledge and skills necessary to fulfill their responsibilities, an organization may ask them to participate in an onboarding process (Klein & Heuser, 2008; Klein et al., 2015). Onboarding activities work to remove obstacles new board members face that can prevent them from competently participating in board member responsibilities. Onboarding involves acquiring an understanding of the roles and responsibilities of board members, policies that enable or disable specific action(s), and the impact of their roles on the wider community and organization. Failure to prepare new board members adequately can lead to ineffective boards (Loflin, 2019).

As Figure 2 illustrates, *onboarding*, also known as organizational socialization, is the *entire process* where organizations welcome, inform, and guide new members as they work to acquire the knowledge and skills to competently and effectively fulfill their responsibilities (Klein & Heuser, 2008; Klein et al., 2015). Onboarding
involves the “formal and informal practices, programs, and policies enacted or engaged in by an organization or its agents to facilitate newcomer adjustment” (Klein et al., 2015, p. 263).

Orientation is one part of the onboarding process, and while practitioners and applied researchers often use onboarding and orientation interchangeably, there is a distinction between these two concepts. Orientation is one activity in the onboarding process, which serves as the primary method of informing board members about their roles and responsibilities (Lamont, 2008; Price, 2018; Sims, n.d; Viktorin, & Downs n.d.). Both onboarding and orientation are important in increasing new board member effectiveness, self-assurance, and job contentment (Denny, 2015).

Figure 2
Welcome-Inform-Guide Framework


CRVA Profile

In 2004, an amended charter called for a 13-member board of directors to govern CRVA, with four members appointed by Charlotte’s Mayor and nine appointed by the Charlotte City Council (N.C. Sess. Laws 2004-14, 2004).
Board members serve staggered three-year terms, so newly appointed and reappointed members comprise one-third of CRVA’s board each year.

Currently, CRVA’s formal onboarding process for new board members consists of an orientation, with little contact before or afterwards. Each orientation lasts approximately 1-2 hours and covers a wide array of topics to inform new board members about CRVA, its board structure, applicable legislation, board policies, and the strategic plan (see Appendix H for a complete listing of the sections).

Through the Aligned Influence model, CRVA encourages board members to become advocates for CRVA, while working in aligned roles with the executive team. With this in mind, CRVA has four main goals for its orientation:

- learning their role within CRVA and how it relates to staff,
- developing an appreciation of the organizational culture,
- understanding the budget and financials, and
- recognizing CRVA’s strategic goals.

**Data and Methods**

The MPA team used three data collection methods to develop its recommendations, including:

- a review of onboarding and orientation literature,
- interviews with current CRVA board members and staff, and
- interviews with peer organizations to benchmark CRVA’s current practices.

The MPA team used this data to identify findings and opportunities to strengthen and enhance CRVA’s new board member onboarding and orientation process. Since CRVA’s current onboarding process primarily consists of an orientation, data collection techniques focused on evaluating and enhancing that process. A more detailed explanation of each method is provided below.

**Literature Review**

The MPA team conducted a thorough literature review of research published in peer-reviewed academic journals, trade journals, and practitioner websites on several topics. These topics included:

- the roles and responsibilities of the board of directors,
- designing, implementing, and evaluating successful orientations and training,
- onboarding new employees and volunteers,
- organizational socialization theories,
- obstacles to learning effectively, and
- best practices related to onboarding and orientation.

The literature review was a continuous process focused on reaching the data saturation point, or the point where the MPA team found no new information or themes in the literature. The report, findings, and recommendations for each theme incorporate the information found in the literature review.
CRVA Board Member and Staff Interviews

The MPA Team conducted confidential interviews with 10 individuals affiliated with CRVA, including current board and staff members. The team customized interview scripts for each board and staff member. The goal of the interviews was to obtain information regarding:

- communication between CRVA and new board members prior to orientation,
- logistics of the orientation (e.g., content, location, duration, participants, etc.),
- effectiveness of orientation in preparing new board members to fulfill their responsibilities,
- support provided to new board members after orientation, and
- strengths and opportunities to enhance CRVA’s new board member onboarding process.

Interviewers used a semi-structured interview guide, which allowed for meaningful dialogue on broad themes related to the interviewee’s experience with CRVA’s new board member orientation. Overall, the interview guide consisted of six primary questions with probes included to ensure there was enough data to analyze each theme (see Appendix E for interview instrument). A representative from the MPA team initiated contact with prospective participants via email. Individuals agreeing to an interview had the option of participating via telephone or in-person. Interview teams, consisting of a primary interviewer and note-taker, interviewed 10 current board and staff members between February 26th and March 3rd, 2020.

Benchmarking Peer Organizations

Benchmarking is a managerial tool that improves internal performance by identifying and applying best practices from peer organizations with similar characteristics (Bogetoft, 2012). The MPA team benchmarked CRVA’s current board member onboarding process to its peers, which included Visit Denver, Visit Seattle, Visit Phoenix, Visit Austin, the Nashville Convention and Visitors Corps, Visit Atlanta, and the Longmont Chamber of Commerce, to understand their onboarding and orientation processes. Each peer organization provided a short description of their process, focusing on the themes of Onboarding, Orientation Content, Orientation Participants, Orientation Setting, and Orientation Duration, by both email and phone.
Findings & Recommendations

The research conducted by the MPA team led to 15 findings and recommendations to enhance CRVA’s current onboarding process. These are organized around five themes – Onboarding, Orientation Content, Orientation Participants, Orientation Setting, and Orientation Duration. Each theme describes the most important aspects of new board member onboarding and orientation.

Onboarding

Onboarding is the process where organizations welcome, inform, and guide new members as they work to acquire the knowledge and skills to competently fulfill their responsibilities (Klein & Heuser, 2008; Klein et al., 2015). The length of time it takes for an individual to transition from an organizational outsider to an effective board member varies on the person and the organization. The onboarding process may last anywhere from several months to one year, but it does not start and stop with the orientation (see Figure 2). Additionally, activities before and after orientation may help ensure the organization focuses on welcoming and guiding new members, two goals of the onboarding process (Klein & Heuser, 2008).

Current Practices

Interviewees indicated they received little contact from CRVA between their appointment to the board and their orientation. The only contact they had with CRVA prior to their orientation was an email congratulating them on their appointment and a request to schedule their orientation. Any communication prior to orientation did not substantively prepare new board members for the orientation. At the start of new member orientation, CRVA provides new members with a copy of the “Board of Directors ϭϬϭ” binder, a collection of printed materials, which new members reviewed with the CEO and other staff members. New board members also have the opportunity to ask questions about the organization and their role as a board member during their orientation.

Recommendations

1. Provide pre-orientation materials and support.

Pre-orientation is the period of time between an individual’s appointment to the board of directors and the formal orientation session. This time is important, as board members will likely begin forming impressions about the organization, its operations, and their fellow board members before they attend the formal orientation (Burns, 2017). The pre-orientation period is also a time of higher anxiety for many new board members, as they are aware of their new responsibilities to the organization but have little direction on their role (Beck, 2016). CRVA can take an active role in engaging new members, prior to the orientation, to reduce anxiety and create positive impressions. They can also maximize the benefits of onboarding by developing goals and expected outcomes for the orientation process, distributing key introductory materials prior to the orientation, and conducting a pre-orientation evaluation.
a. Develop goals and expected outcomes for the orientation process.

Experts suggest identifying learning objectives to drive the orientation process (Cordiner, 2017; Kirkpatrick & Kirkpatrick, 2016). Based on data from interviews, four core learning objectives that can shape the way that CRVA designs its orientation process may be for new board members to:

- learn their role within CRVA and how it relates to staff,
- develop an appreciation of the organizational culture,
- understand CRVA’s budget and financial landscape, and
- recognize CRVA’s strategic goals.

b. Distribute orientation materials prior to orientation.

Individuals are only able to absorb a limited amount of information in a set time period (Miller, 1956). While there is little agreement on how much content an individual can retain in one setting (Baddeley & Hitch, 1974; Miller, 1956) and what content is essential to cover in new board member orientations (Beck, 2016; Harris, 2018; Tysiak, 2018), most would likely agree that the amount of information CRVA includes in its orientation coupled with the content’s dense nature is overwhelming for new board members. After identifying core learning objectives for the orientation, CRVA can divide its current materials into two sections: pre-orientation and orientation. Pre-orientation materials should include a summary of information critical to meeting the orientation’s learning objectives, along with access to more in-depth orientation materials, to provide accurate reference points for the orientation.

Distributing summary materials prior to the orientation allows new board members to prepare in advance, read and review material at a pace appropriate for them, and consider questions regarding complex orientation materials. We recommend providing access to materials in the congratulatory email that CRVA sends to new board members. Key materials new board members should receive prior to orientation include:

- orientation’s learning objectives,
- agenda for orientation,
- summary of materials needed for orientation, and
- summary of materials to review prior to orientation.

c. Conduct a pre-orientation evaluation.

Assessing an individual’s previous trainings or orientations allows leaders to identify gaps between established learning objectives and the participant’s current knowledge (Palazzolo, 2018). Using feedback from pre-assessment allows leaders to focus their session on strengthening participants’ weaker areas. As such, the onboarding process can include a brief pre-orientation evaluation to inform its orientation while engaging new board members prior to orientation. Table 2 provides suggested areas CRVA should consider in a pre-orientation evaluation as well as examples of questions.
Table 2
Pre-Orientation Evaluation Topics

<table>
<thead>
<tr>
<th>Topic</th>
<th>Example Question</th>
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</thead>
<tbody>
<tr>
<td>Knowledge of the organization’s roles and responsibilities</td>
<td>What do you expect will be your primary roles to the CRVA as a director?</td>
</tr>
<tr>
<td>Knowledge of material specific to committee assignments</td>
<td>How much experience do you have in overseeing budgets and funding streams?</td>
</tr>
<tr>
<td>Level of anxiety with the new role</td>
<td>On a scale of 1-10, 1 being the least confident, how would you rank your confidence in taking on this new role? Please explain.</td>
</tr>
<tr>
<td>Unique needs of the new member, or new skills he or she can bring to the table</td>
<td>What do you feel will be the biggest hurdle in taking this new role as a board member?</td>
</tr>
</tbody>
</table>

2. Continue conducting an orientation program with recommended enhancements.

CRVA currently hosts a formal orientation to teach new board members about their expected roles and responsibilities within the organization. While the orientation should not be the only part of the onboarding process, it plays a key part in ensuring new members are informed and capable of fulfilling their duties (Klein & Heuser, 2008). As such, the formal orientation should still play a key role in CRVA’s onboarding process. Additionally, an enhanced orientation can include existing board members, encourage interaction between board members, and serve as a refresher for existing members. CRVA can accomplish these by continuing to host a formal orientation and inviting current board members to attend new board member orientation.

a. Continue hosting a formal orientation.

CRVA’s current orientation supports a key goal of the onboarding process, which is providing information to new board members. As such, CRVA should continue conducting an orientation as the central component of its onboarding process. Expanding its onboarding process beyond the orientation to welcome and guide new board members with activities will strengthen CRVA’s current process (Klein & Heuser, 2008). We discuss specific recommendations to enhance CRVA’s current orientation in recommendations 4 through 16.

b. Invite current board members to attend new board member orientation.

Asking current board members to attend could improve new board member orientation. Recall that one goal of onboarding is for new board members to feel welcome (Klein & Heuser, 2008). Visit Seattle and the Nashville Convention and Visitors Corp allow current board members to attend the orientation for new board members. They stated that creating space for new and current board members to interact can augment networking opportunities for new board members, strengthening board member relationships. Not only is including current board members likely to make new members feel welcome, but it allows current members to update their understanding of board policy, their roles, and CRVA operations. Peer organizations also mentioned the benefit of refreshing current board members’ knowledge during their interviews.
3. Conduct post-orientation activities that allow for new board member integration and allows facilitators to assess effectiveness.

The onboarding process continues beyond the formal orientation and even beyond the first few board meetings. It can take months to one year for new board members to feel comfortable in their roles and begin making meaningful contributions to the organization (Denny, 2015). Considering this, CRVA can structure an onboarding process that empowers new members to begin contributing and applying newly learned information, as well as use orientation feedback to improve the future orientation sessions. CRVA can accomplish this through mentorship, a post-orientation evaluation, an initial committee assignment, and orientation document postings.

a. Facilitate mentorship between experienced board members and new members.

The initial adjustment period associated with joining a new organization often heightens an individual’s “anxieties and uncertainties about the demands of, and fit with, their new position and organization” (Klein & Heuser, 2008, p. 280). There is evidence that social agents, which are “individuals or groups who facilitate the adjustment of newcomers by providing ‘information, feedback, role models, social relationships and support, as well as access to broader networks and work-relevant resources’” (Cooper-Thomas & Anderson, 2006, as cited in Klein & Heuser, 2008, p. 280), can shorten the adjustment period for new board members. Mentors are one type of social agent that can help new board members in their onboarding process. Mentors may offer new board members advice, social support, and help them reduce uncertainties in the initial adjustment period (Beck, 2016; Klein & Heuser, 2008). In addition, mentors can serve as a valuable resource for learning board and staff responsibilities (Tysiac, 2018), therefore, shortening the new board member’s adjustment period.

New board members should be partnered with more experienced board members who have the same committee assignment. Since board members are volunteers and have other commitments outside CRVA, a board member mentoring program may consist of a meeting outside CRVA prior to orientation and then sitting with and introducing the new board member at the first two or three board/committee meetings. A mentor-mentee relationship can “help build the relationships necessary for social acceptance and social integration,” which can help new board members acclimate to the organization more quickly (Klein & Heuser, 2008, p. 288).

Interview respondents overwhelmingly agreed that increased interaction with other board members early in their tenure would have helped their transition onto the board. Establishing relationships with and gaining the trust of existing board members can help new board members feel welcome and included (Forsyth, 2020). Thus, many respondents agreed that having a mentor could reduce the time it takes for new board members to feel as if they are part of the team, allowing them to make meaningful contributions to CRVA soon after joining the board.

To accomplish a more complete onboarding process many of the benchmarked organizations include experiences outside of their orientation. Visit Austin invites board members to networking events for relationship-building purposes. Similarly, Visit Denver has a lunch hour prior to their board meetings for board members and staff members to come together and meet once a month and talk about things outside of their official position as a board member.

b. Conduct a post-orientation evaluation.

CRVA can include a brief post-orientation evaluation as part of the onboarding process. This should be given 3-6 months after the orientation to help understand how effective the orientation was in achieving pre-selected goals. The CRVA can then use feedback to improve
the orientation process in the future. Table 3 presents suggested topic areas CRVA should consider in a post-orientation evaluation as well as examples of questions.

**Table 3**

**Post-Orientation Evaluation Topics**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Example Question</th>
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<tbody>
<tr>
<td>Knowledge of the organization's roles and responsibilities</td>
<td>How would you define the role that CRVA plays in the greater Charlotte community?</td>
</tr>
<tr>
<td>Knowledge of the board members' specific roles and responsibilities</td>
<td>How would you define your role as a director at CRVA?</td>
</tr>
<tr>
<td>Knowledge of material specific to committee assignments</td>
<td>How would you define the different ways that CRVA is funded?</td>
</tr>
<tr>
<td>Sense of engagement with the material</td>
<td>What did you find most interesting about the materials learned at the orientation?</td>
</tr>
<tr>
<td>Confidence level for sharing new ideas with the team</td>
<td>How do you feel that you can uniquely contribute to the board and your committee?</td>
</tr>
<tr>
<td>Feedback about orientation</td>
<td>What part of orientation was most/least helpful in preparing you for the board?</td>
</tr>
</tbody>
</table>

**c. Provide new members with committee assignments that match skills and professional background.**

Individuals only learn so much through traditional learning activities (e.g., lectures, readings, etc.). However, research suggests active learning techniques (e.g., discussions, hands-on practice, etc.) often result in individuals mastering the material more quickly and completely than traditional, passive learning activities (Williams, 2017). Thus, CRVA can engage new board members by assigning them to a committee early in their tenure (Schindlinger, 2017). This hands-on, active experience will likely result in a deeper understanding of the unique way that CRVA’s board and staff conducts business (Klein & Heuser, 2008).

Additionally, interview feedback revealed that new board members are often assigned to the budget committee for their first committee assignment. While serving on the budget committee allows new board members to familiarize themselves with CRVA’s complex financial landscape, some suggested that their assignment to the budget committee extended their initial adjustment time as they found this committee work overly complex and difficult to understand. Assigning new board members to committees that best matches their skills and interests allows new board members to begin making meaningful contributions earlier in their term.

**d. Post relevant orientation documents and reference materials for easy access.**

Organizations should ensure new board members can quickly and easily access essential documents outside of orientation (Levinson et. al., 2018). Currently, CRVA uses BoardBookIt, an online portal, to securely store board-relevant documents and communicate with board members. CRVA should provide new board members with access information and demonstrate how to navigate the platform during orientation. After orientation, CRVA should post all onboarding material to BoardBookIt. This will allow new board members to review material on their own, freeing up time during the orientation for higher-level content (Levinson et al., 2018).
Orientation Content

The main goal of a new board member orientation is to inform board members about the organization (its mission, vision, strategic goals, etc.), their roles and responsibilities as board members, and the legal and financial environment the organization operates within (Klein & Heuser, 2008). A thorough orientation must strike a balance between providing board members with essential information without overwhelming them with too much content (Levinson et al., 2018). A successful orientation can ensure new board members are prepared to participate and effectively fulfill their board duties (Patton, 2018).

Current Practices

The current CRVA practice is to provide new board members with a copy of the Board of Directors 101 binder at the start of their new member orientation. The binder contains 226 pages divided into 16 sections focused on understanding CRVA, its board structure, applicable legislation, board policies, and CRVA’s strategic plan (see Appendix H for a complete listing of the sections). During orientation, a PDF version or PowerPoint presentation of the binder’s materials is often displayed on a large screen and discussed by orientation leaders as new board members follow along with their printed material.

Recommendations

4. Continue providing detailed content from previous orientations with recommended enhancements.

Current board members indicated that the content included in the Board of Directors 101 binder was critical to understanding their roles and responsibilities as board members. Several board members reported the binder contained comprehensive, detailed information that they referenced throughout their time on the board. With provided enhancements, the current material will continue to serve as a valuable reference guide for board members during their board term(s) as questions arise.

a. Continue providing information included in the current Board of Directors 101 binder.

Based on interviews with current board members and CRVA staff, recommendations for the main learning objectives for new board member orientation should include:

- learning their role within CRVA and how it relates to staff,
- developing an appreciation of the organizational culture,
- understanding the budget and financials, and
- recognizing CRVA’s strategic goals.

Thus, it is no surprise that current board members revealed material related to the board member’s roles and responsibilities, CRVA’s mission, vision, and values of the organization, its strategic plan, as well as the budget and finances was the most helpful content currently provided that aids in preparing board members for their tenure. Benchmarked organizations present similar information at their orientations. Visit Austin, Visit Phoenix, Visit Atlanta, Visit Denver, and Visit Seattle provide the organizational chart, board roles and responsibilities, and strategic and marketing plans in their binder.
b. Make recommended enhancements.

Enhancements would include adding additional documents (Recommendation #5), organizing and prioritizing the content by topic area (Recommendation #6), creating summaries of complex documents (Recommendation #7), and presenting materials in a variety of formats (Recommendations #8).

5. Add pertinent topics from research to Board of Directors 101 binder.

The Board of Directors 101 binder content currently provided by CRVA includes the necessary information that researchers recommend organizations provide to new board members. Additionally, CRVA provides similar material as benchmarked organizations, such as an organizational chart, board roster, board bylaws, roles and responsibilities, prior year meeting minutes, schedule for meetings, strategic and marketing plans, and charges from the city/state (if applicable).

Interviewees suggested including additional information about funding sources, advocacy points, and responses to common questions about CRVA in the material. Board members also suggested it would be valuable to address CRVA’s balanced scorecard and Aligned Influence in more detail.

6. Organize and prioritize content by topic area in the Board of Directors 101 binder.

Interviewees remarked on the visual composition of the binder noting it appeared as separate documents combined in an unstructured arrangement that lacked consistent formatting and page numbers. Thus, interviewees did not see the material provided in the Board of Directors 101 binder as a complete, cohesive document.

As noted, CRVA includes most of the information research suggests in its current binder, however, its current structure creates confusion. Through strategic prioritization and presentation of information, CRVA can alleviate that confusion. We recommend reorganizing its materials according to topic areas that align with the orientation learning objectives such as:

- CRVA overview and strategy, including history, purpose, and strategic and marketing plans,
- board governance, including member roles and responsibilities and organizational policies and procedures,
- funding schematics, including budget and financials, and
- legislation.

Experts suggest discussing the most critical content first, before information overload prevents new board members from retaining any more information (Rimmer, 2020). An individual's capacity to retain information decreases as the orientation progresses (Rimmer, 2020), so CRVA must consider not only the information it includes in the orientation but also the content’s arrangement. By organizing and prioritizing the orientation material and presentation, CRVA is able to highlight key information new members need to understand to effectively perform and succeed in their new role. A table of contents with strategic ordering of materials is included in Appendix A.

7. Create summaries and overviews of each topic area in the Board of Directors 101 binder.
Board members proposed providing overviews, summaries, and definitions as part of the orientation material to help alleviate confusion. Overviews and summaries should be in the front of each topic area in the Board of Directors 101 binder followed by the full text of the documents, and a glossary at the end (see suggested table of contents in Appendix A). Creating these overviews and summaries could help prevent misunderstanding, mitigate content overload, make the information more digestible, and serve as a convenient reference throughout the board member’s term(s).

a. Create summaries of topic areas and provide with pre-orientation material.

CRVA should summarize the material in each topic area of the binder’s table of contents. Summaries relating to CRVA’s Overview and Strategy, Policies and Procedures, Funding Schemes, and Legislation should be included. Additionally, CRVA should distribute these summaries to new board members prior to orientation. This will allow new board members to prepare for orientation, but at the same time, it ensures they do not receive complex and potentially confusing material without the benefit of explanation from orientation leaders.

b. Create overviews of topic area content.

Interviewees suggested many documents are either too technical for a new member to understand at a quick glance, such as CRVA’s Balanced Scorecard with unknown acronyms and terms, or too heavily detailed for quick comprehension. CRVA would provide overviews of its facility functions, committees and purpose, strategic plan and perspective, program objectives, Aligned Influence, and the House and Senate bills as part of the orientation material.

8. Produce and present materials in a variety of formats.

According to Klein and Heuser (2008), orientation programs vary in form and administration. Each individual has their own learning style (Riding & Rayners, 1998). Peer organizations most often use PowerPoint presentations; however, Visit Austin utilizes Google Slides to allow presenters to edit their sections. In the interviews, many board members noted that other materials, in addition to the Board of Directors 101 binder, would have been beneficial in comprehending the material. This is consistent with the six benchmarked organizations who use both printed materials, PowerPoint, and guest speakers.

CRVA could produce and present orientation materials through various formats including PowerPoint, videos (informational and marketing), infographics, expert and keynote speakers, and printed materials. By providing materials in a variety of formats, CRVA can ensure that it is adaptive to multiple learning styles. People remember information displayed through both visuals and text (Craik and Lockhard, 1972; Gerald & Arlt, 2015; Pavio, 1986). By presenting data in visual ways, new board members are more likely to process information faster as well as retain more of that information. CRVA should include tables, graphs, charts, and infographics whenever information permits use of such visuals to allow simple display and easy understanding.
Orientation Participants

Participants in the orientation may be newly appointed board members, previously appointed board members, the CEO, key staff, and others with relevant expertise.

Current Practice

In the past, the CEO and CFO, with minimal involvement from other board members or staff, have led orientation sessions for one or several new board members at a time.

Recommendations

9. Conduct orientation for all new board members at the same time.

Group learning exposes individuals to a range of benefits that result in improved performance outcomes compared to learning independently (Cen et al., 2014; Forsyth, 2020). Forsyth (2020) finds learning in groups reduces stress and anxiety levels for participants, facilitates the exchange of information, and provides encouragement for participants as they begin adjusting to their role in a new organization. Group learning also allows facilitators to engage individuals in active learning activities through interactive and cooperative learning strategies (Olivera & Straus, 2004), while allowing new board members to support each other through the process (Forsyth, 2020). Additionally, serving on a board requires individuals to work as a group to fulfill their responsibilities to the organization. Orienting new board members at the same time allows individuals to work together before their first board meeting (Olivera & Straus, 2004).

Current board members indicated that hosting orientation for new board members simultaneously could be helpful to achieving benefits associated with group learning. Additionally, they could have begun cultivating relationships with other board members and bonding over a shared experience. Similar organizations attempt to orient all new board members at once to build camaraderie (Nashville Convention & Visitors Corp, Visit Austin, Visit Denver, and Visit Atlanta). Conducting group orientations will allow CRVA to help alleviate possible uncertain feelings among new members.

10. Include the board chair, committee chairs, and other board members as appropriate.

New board members can benefit from the expertise of the board chair, committee chairs, and other board members during their orientation. Organizations often include board chairs and other board members in their orientation process (Burns, 2017). Having experienced board members share their perspective or serve as mentors can be valuable to new board members (Ha et al., 2017; Harris, 2018). In addition to discussing potential roles current board members can play in orientation below, Appendix B includes a Sample Orientation Agenda and highlights different ways CRVA can engage current board members in new board member orientation.
a. Have the board chair lead or present during the orientation session.

The board chair has valuable experience they can share with new board members. Certain portions of the orientation would likely be more beneficial to new board members, if the board chair participated. Thus, CRVA should engage its board chair in orientation, especially when discussing topics such as Aligned Influence, the balanced scorecard, and the board roles and responsibilities. CRVA should consider other areas of orientation where including the board chair’s unique perspective on the specific roles of CRVA board members would be advantageous to new board members.

b. Have committee chairs present on their committee’s tasks.

Interview respondents showed a strong preference for including other board members in orientation. This would allow new board members to interact with and learn from more experienced board members. One way to involve current board members in orientation is to have each committee chair present a brief overview of their committee and its purpose. All CRVA board members serve on at least one of the six committees: the executive committee, the audit committee, the budget committee, the nominating committee, the strategic planning committee, and the visitors advisory committee, so it is important they understand the role of each committee and who chairs it. Visit Atlanta invites its committee chairs to the orientation for that purpose.

c. Encourage current board members to attend the orientation.

Interviewees indicated that it would be helpful to hear other board members’ experience or perspective about serving on CRVA’s board. While it would be a time commitment for existing members, the board chair could inform board members of the orientation date and agenda ahead of time and encourage members to attend (parts of) the session or accompanying social events.

Another way to include the board chair, committee chairs, and other board members in an orientation is through informal group activities. Team building, which in this context could be a lunch gathering, is a vital investment to your group and can increase cohesiveness through trust and communication, and decrease discord (Scudamore, 2016). In short, incoming CRVA board members would benefit from interacting with and learning from seasoned board members during the orientation session.
11. Continue to involve senior leadership and involve other key staff in areas of their expertise.

It is important to continue including senior leadership in new board member orientation (Tysiac, 2018; Burns, 2017). Additionally, CRVA should invite other key staff members to share information about their areas of expertise, which can allow for a more in-depth discussion of the material (Tysiac, 2018; Burns, 2017) and help new board members understand their roles compared to staff (Tysiac, 2018). Appendix B includes a Sample Orientation Agenda and highlights different ways CRVA can involve key staff. Using some sort of orientation agenda will allow CRVA to include staff members for specific portions of the orientation, ensuring staff can share their expertise with minimal interruption to their work.

Benchmarked organizations, like Visit Phoenix, include their CEO, COO, senior vice president of sales & services, vice president of marketing, communications, and tourism, and director of research and business analysis to present on their areas of expertise at orientation. Visit Austin also invites key staff to help create the presentation and present on their topics.
Orientation Setting

The space where an organization hosts its orientation can be meaningful for new member’s retention of information (Romano & Nunamaker, 2001). The atmosphere of the orientation should be conducive to learning while also providing new board members with an environment that allows them to focus on the orientation materials (Kleinsasser, 1995).

Current Practice

Interviewees reported that CRVA hosts most of its new board member orientations in the CEO’s office, at an informal location, such as a restaurant, or in the CRVA board rooms.

Recommendations

12. Host orientation sessions at CRVA facilities.

Research suggests that the choice of meeting space has the ability to enhance productivity, encourage communication, promote creativity, and make participants feel relaxed (Romano & Nunamaker, 2001). Research also suggests that orientations conducted in a comfortable atmosphere encourages new board members to ask necessary questions without feeling intimidated (Kleinsasser, 1995).

Additionally, it is important that the meeting space has the necessary audio-video (AV) technology so that the orientation facilitators can present the materials effectively to new board members. Such AV technology could include computer or TV displays, speakers, internet connection, and video conference software (Fradelos, 2019).

Benchmarked organizations generally begin their orientation sessions at a central office location. Visit Nashville and Visit Seattle both stated that having an orientation in their central offices helped to familiarize the board members with the office and made the space more accessible for future access.

Based on feedback received during interviews, the orientation space of the current CRVA new board member orientation lacked structure, which made it feel like a “courtesy” meeting rather than an effective and strategic learning environment. Interviewees that participated in offsite orientations suggested that hosting the orientation at CRVA offices or facilities would have given the experience more structure. One interviewee noted that “having an orientation in a place that is connected with CRVA allows for visibility and exposure to CRVA facilities.” An interviewee suggested hosting the orientation in a more formal meeting space, such as a conference room, which provides new board members with a place to take notes during the orientation.
Developing an onboarding process and/or orientation that includes a tour of the organization’s facilities can help new members better understand the organization’s purpose and the impact of their decisions (BoardSource, 2016; Cope, 2016). The National Park Advisory Board (2008), spends 1 full day on orientation, with 50% of the orientation dedicated to touring parks in the region. Tours or videos of facilities and offices can inform new board members on facility structures and allow them to get a sense of the organization’s operations. Bayer Canada includes a virtual tour video in their onboarding portal for new members to view (Mills, 2011). If the new board members have a limited schedule and/or a physical tour of the facilities is not an option, a virtual tour or video can still provide new board members a visual of what the organization does (Kleinsasser, 1995).

The interviewees revealed there was a strong preference for touring CRVA’s office and venues to develop a better understanding of company culture and operations. Of the benchmarked organizations, Visit Denver divides the orientation, with the first part of the session at its central offices and the second part devoted to touring major assets of the city and discussing operations. When asked why they go over operations when it is not a board member’s role they stated that, “In order to allocate the budget and explain why they budget in the way that they do, the board members need to thoroughly understand what the budget is going to” (Visit Denver, personal communication, February 17, 2020).

With all board meetings held in the same place, interviewees advocated for tours, as they would present an opportunity to get an idea of “the lay of the land.” A virtual tour can mitigate the time-pressures of trying to schedule physical tours of all five facilities, though hosting the orientation session(s) at a facility will allow for the inclusion of a physical tour at that facility. In addition to considering a tour of the facility where an orientation is held, CRVA has the opportunity to implement tours as an onboarding, post-orientation activity.
Orientation Duration

The length of orientation varies based on the content and needs of the organization. When considering the duration of orientation, organizations must consider the complexity of the material covered. While the duration of the orientation should consider the board member’s busy schedules, covering too much material in a short amount of time will leave board members confused and overwhelmed.

Current Practice

CRVA’s orientation is currently held over the course of a single day. Interviews indicate that the average orientation duration is 1-2 hours.

Recommendations

14. Create a multi-day orientation that fits participants’ schedule.

Creating a flexible orientation allows organizations to meet the needs of multiple board members. Price (2018) suggests onboarding should involve a customized plan based on new member’s knowledge, skills, and schedule. Organizations should prepare to adjust their orientation based on their participant’s schedule and the material covered. The MPA team’s proposed agenda (Appendix A) divides the information into multiple sections, over the course of two days.

Interviewees suggested board members would benefit from a multi-day orientation, which would allow members to learn content in digestible pieces. In reference to the time spent on specific topics, one interviewee mentioned “more than two hours of any one thing is too long.” If it is necessary to have a one-day orientation, several two-hour sessions in one day could be helpful, as it would give new members a break and prevent information overload. Benchmark organizations, such as Visit Denver, allocate at least 7 hours to cover information, split between two days. Visit Atlanta also has a two-day orientation.

15. Allocate approximately 8 hours for orientation information plus time for tours.

Due to CRVA’s size and complexity, the orientation session needs to cover a large amount of information. For each topic of importance, CRVA should allocate sufficient time for new members to absorb information. Acknowledging
that some information is denser, it will take more time to cover. Allocating the appropriate time for each topic will help ensure new board members get the information needed to fulfill their roles effectively.

Interviewees had varying suggestions on how long orientation should be altogether, while one offered a specific breakdown: 1.5 hours on the organization, 1 hour on financials and budgeting, and add time for questions and key speakers. In addition, interviewees suggested that if new board member orientation spans multiple days, no day should contain more than 4 hours of activities. As noted in the Sample Orientation Agenda (Appendix A), the MPA team recommends CRVA focus its first day of orientation on information related to board members’ the roles and responsibilities, its mission, vision, values, and strategic plan, and the rules and regulations that govern the organization. This would allow CRVA to focus the second day of orientation on its budget and finances. Based on the information outlined in the proposed agenda, CRVA should expect to spend 8 hours on orientation, plus additional time for tours. Touring the five physical CRVA facilities can take place before or after the orientation or as a part of the larger onboarding process at a later date.
Conclusion

The MPA team evaluated CRVA’s new member onboarding process by interviewing current board members and staff at CRVA. It compared CRVA’s current practices to those of its peer organizations, as well as to best practices identified in the literature. The findings indicate that orientation is one part of a larger onboarding process.

By implementing these recommendations, CRVA can build on its past successes and enhance its ability to achieve its goals of helping new board members 1) learn their role within CRVA, 2) develop an appreciation of the organizational culture, 3) understand the budget and financial landscape, and 4) recognize CRVA’s strategic goals. Understanding that orientation is only one part of an overall onboarding process will allow CRVA to become a best in class organization preparing new board members to meet the challenges of the future.
Acknowledgments

The MPA team would like to extend their gratitude to Dr. Sarah Pettijohn and Doug Bean, MPA for their guidance and support for the project. The team would also like to thank the following for their time, assistance, and contributions to the report:

- CRVA’s staff and board of directors,
- The Aligned Influence team, and
- The teams at Visit Denver, Visit Seattle, Visit Phoenix, Visit Austin, the Nashville Convention and Visitors Corps, Visit Atlanta, and the Longmont Chamber of Commerce.
References


National Park Service Advisory Board; Meeting. (2008). In *The Federal Register / FIND* (vol. 73).


Viktorin, J., & Downs, L. (n.d.). *Onboarding and orientation*. http://www.hrpa.ca/ProfessionalDevelopment/Pages/PDinaBox%E2%84%A2TopicDescriptionOnboarding.aspx

Appendices

A. Table of Contents of the Board of Directors 101 binder
B. Suggested Sample Agenda
C. Scope of work
D. Interview Methodology and Analysis
E. Interview Instrument
F. CRVA Profile/Aligned Influence
G. Onboarding and Orientation
H. Current Orientation Flow and Materials
I. Orientation Content
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Note: The page numbers in this table are not the actual page numbers. The numbers in the table are used to illustrate the order of the renewed Board of Directors 101 binder.

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<td><strong>LEGISLATION</strong></td>
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### B. Suggested Sample Agenda

Find below the agenda for a suggested two-day orientation.

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<th>Duration</th>
<th>Topic</th>
<th>Suggested Presenter/Lead</th>
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<tr>
<td></td>
<td>± 1 hour</td>
<td>Introduction of CRVA</td>
<td>CEO and/or board members</td>
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<td>- Mission</td>
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<td>- Vision</td>
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<td>- Values</td>
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<td>- CRVA Structure &amp; Agencies</td>
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<td>- Economic Overview of Industry</td>
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<td>- Aligned Influence</td>
<td>Board chair</td>
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<td>± 1 hour</td>
<td>Strategic Plan</td>
<td>CEO, Board chair, and/or member of Strategic Planning Committee</td>
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<td>- Balanced Scorecard</td>
<td>Board chair</td>
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<td>- Assessing CRVA Performance</td>
<td>Board chair</td>
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<td><strong>Break for Lunch</strong></td>
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<td></td>
<td>± 1 hour</td>
<td>Policies &amp; Procedures</td>
<td>CEO and/or members of Executive Committee</td>
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<td>- Board Member Roles &amp; Responsibilities</td>
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<td>- Investment Policy</td>
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<td>± 1 hour</td>
<td>Explanation of legislation</td>
<td>Legal Counsel</td>
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<td>- House &amp; Senate Bills</td>
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<td><strong>Break for Lunch</strong></td>
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<td><strong>Optional:</strong> Team Building Activity (invite all board members)</td>
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<td><strong>Conclude</strong></td>
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## DAY 2

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<td>Marketing and Branding</td>
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<td>± 2 hours</td>
<td>Financials</td>
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<td><strong>Financials</strong></td>
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<td>• Funding</td>
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<td>• CEO Evaluation</td>
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<td>± 1 hour</td>
<td>How to use the BoardBookit</td>
<td>Member of Executive Committee</td>
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<td>Status Update: Matters pending</td>
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<td>± 1 hours</td>
<td><strong>Optional:</strong> Tour of orientation facilities (Start location depends on location of earlier meeting)</td>
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<td>• Uptown: NASCAR/Charlotte Convention Center/Spectrum Center</td>
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<td>• Bojangles Coliseum/Ovens Auditorium</td>
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### Break for Lunch

**± 1 hour**

Optional: Social event (e.g. U.S. National Whitewater Center, Topgolf, brewery) for all board members
C. Scope of Work

Charlotte Regional Visitors Authority (CRVA) Onboarding Process Evaluation
Scope of Work
January 28, 2020

Project Overview

The Charlotte Regional Visitors Authority (CRVA) is a division of the City of Charlotte that leads in destination development, marketing, and venue management expertise. CRVA is an independent Authority established under the charter of the City of Charlotte. It receives funding via local hotel and motel occupancy taxes, a 1% prepared food and beverage tax, as well as the revenue created by each of its brand divisions. The organization collaborates with the City to advance its mission in creating jobs and opportunities for the Charlotte community. The CRVA also supports the operations and marketing for the Charlotte Convention Center, Spectrum Center, Bojangles’ Coliseum, Ovens Auditorium, NASCAR Hall of Fame, Charlotte Regional Film Commission, and Visit Charlotte in conjunction with the region’s destination marketing brand. Furthermore, CRVA looks to advance the visitor economy, recognizing that visitor spending continues to be an essential catalyst in making the City an attractive place to live, work, play, and visit.

A 13-member board of directors guides the overall direction alongside Chief Executive Officer (CEO) Tom Murray. The mayor and the city council oversee the operations of the board and appoint board members. The organization manages city-owned assets with values exceeding $500 million and employs more than 200 full-time and 1,500 part-time employees. Board members actively participate in the oversight and management of the organization in collaboration with the CEO as well as act as advocates for the organization in the community. CRVA has recently experienced a shift in organizational culture that places an emphasis on trust, collaboration, innovation, integrity, engagement, accountability, and inclusion to ensure that the organization values and meets the needs of all employees. CRVA has also instituted the Aligned Influence model, which defines the role of both the board and the executive and stresses that the key to organization success is aligning those influences appropriately. CRVA believes that now is an advantageous time to update its current orientation and onboarding process for new board members to align with the evolving culture of the organization.

The CRVA has contracted with the Master of Public Administration Capstone class at UNC Charlotte to develop recommendations for the organization’s orientation and onboarding process for new board members. The 13-member class, along with the support of two UNCC faculty members, is responsible for researching current best practices and trends, and analyzing the CRVAs current practices. The class will produce a report that will contain the findings of those trends as well as recommendations to closer align the two.

Project Objective

The UNCC MPA team will provide CRVA with an evaluation of the current board member orientation and onboarding process through analysis of relevant organization data and information gathered via interviews and/or surveys with the key stakeholders. The MPA team will deliver recommendations to increase the effectiveness of the board member onboarding process, to improve current successful strategies utilized by CRVA, and to utilize best practices from similar organizations.
Scope

The tasks listed below define the MPA team’s logistical approach. It should be noted that while these tasks have been listed consecutively, some tasks will overlap and be conducted concurrently.

1. **Project Initiation and Preliminary Research**
   - The project shall begin with the collection of relevant data, organizational documents, and other pertinent information that the MPA team needs in order to become familiar with CRVA. Representatives from CRVA presented information about the organization and the current onboarding process to the class. This phase also includes the development of the MPA team’s internal project management approach and strategy for ensuring that the project milestones are met.

2. **Literature Review**
   - The MPA team will conduct a comprehensive literature review of all relevant academic and non-academic literature, including board member onboarding practices of similar organizations. The team will synthesize the literature into the final report to provide insight into best practices and strategies of board onboarding.

3. **Data Collection**
   - The purpose of this task is to gather and review relevant information and documents from CRVA that are necessary to conduct the evaluation and assessment. The MPA team will collaborate with CRVA to finalize a list of stakeholders to interview as part of this project.

4. **Data Analysis and Findings**
   - The MPA team will analyze the information gathered from the interviews of CRVA board members and other relevant stakeholders to identify the key findings that will aid in the development of recommendations.

5. **Develop Recommendations**
   - This task will entail the development of recommendations to the CRVA and their wider stakeholders. These will be based on the results of the data collection, best practice identification from the literature review, and stakeholder engagement efforts.

6. **Submit Draft Report**
   - The MPA team will prepare and submit an electronic version of a preliminary draft assessment report to the CRVA. Feedback from the CRVA will be incorporated into the final report.

7. **Submit Final Report**
   - After the CRVA staff has reviewed and commented on the preliminary draft report, the MPA team will prepare a final report and deliver both hard copies and an electronic copy of the final report to the CRVA.

8. **Present Findings**
   - The MPA team will present the results of the assessment to the CRVA in May 2020 (date TBD).

### Deliverables

<table>
<thead>
<tr>
<th>Task</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Project Start (CRVA Presents Project)</td>
<td>January 14, 2020</td>
</tr>
<tr>
<td>2. Deliver Final Scope of Work</td>
<td>January 29, 2020</td>
</tr>
<tr>
<td>3. Deliver Draft Report to CRVA</td>
<td>April 22, 2020</td>
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<tr>
<td>4. Present Final Recommendations to CRVA</td>
<td>TBD</td>
</tr>
<tr>
<td>5. Submit Final Report to CRVA</td>
<td>TBD</td>
</tr>
<tr>
<td>6. Project End</td>
<td>May 7, 2020</td>
</tr>
</tbody>
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Limitations

1. The schedule of the project is limited to the Spring Semester (January 14, 2020 to May 7, 2020), which allows for little flexibility in the timeline.
2. The level and quality of input and involvement from current and/or previous CRVA board members is unknown at this point, which may be a limiting factor in the collection of information needed to develop recommendations.

Note: Following the execution of the Scope of Work, it was decided that the final report and final presentation would be delivered on May 4, 2020.
D. Interview Methodology and Analysis

To gain insight into specific experiences regarding onboarding and orientation at CRVA, the MPA team conducted interviews with 10 individuals who have experience with this process. The team aligned the interview scripts for board members and staff to be able to better compare results. The interviews were scheduled and conducted in February and March of 2020, and the interview team consisted of one-person interviewing, and another taking notes.

Method

Interviews are a particularly useful method of gathering qualitative data for several key reasons. Interviews effectively capture different views, experiences, and other factors for unique individuals. Interviews also allow for interviewees to communicate their personal beliefs and experiences more accurately than say for example a survey (Gill et al., 2008). Our interviews were semi-structured in nature to help capture, explore and define several key areas. These semi-structured interviews provided guidance for the interviewer, while also allowing room for the participants to discuss what they felt was most important. Interviews were constructed to obtain what CRVA did during the orientation process, what the board members took from the process, and areas in which board members felt CRVA could improve.

Additionally, our interviews were constructed to ensure each interviewee would have confidentiality, and thus inviting the interviewee to speak freely. To ensure confidentiality, Unique ID numbers were given to each interviewee. After the interview, the interviewer and note-taker would eliminate any identifying information and replace it with that Unique ID number. This prohibited other team members from knowing who gave what responses when analyzing the data.

Structure

Interviews were broken down into several key categories in order for the interviewer to best deliver questions, and then analyze data.

- Pre-orientation: The goal was to determine how much contact board members had if any with CRVA from appointment to the actual orientation process. Understanding how CRVA prepares new board members was the key objective.
- Orientation: This was the main content of the interview. This portion would give us the who, what, when, where and how of the orientation process. Our interview was structured in a way that would tell a story and get the interviewee to remember their experience.
- Post-orientation: The goal here was to determine how much the interviewer felt prepared for their first board meeting and see when they eventually felt prepared to contribute as a board member.
- Reflection: This question allowed board members to reflect on the process as a whole and express what helped them in their onboarding process and what could be improved.

Analysis

The last step of the interview process is the analysis. The purpose of the analysis is to identify any themes that aligned with previous literature in order to make future recommendations. Accomplishing this task included collaboration from the interviewers and data analysis team. From the literature review, we were able to establish multiple categories for themes about the orientation and onboarding process. To ensure the accuracy and integrity of data recorded from the interview, the interviewers were responsible for taking their information from the interview and placing it into one of the categories. The interviewers would also have the best knowledge of the interviewee’s tone and body language, which would allow them to better interpret answers. Once the responses were placed into a category, the data analysis team served as a measure of quality control; this included making sure answers were categorized correctly. Lastly, the data analysis team identified key takeaways within each category.
E. Interview Instrument

Hello, before we get started, I want you to know that what you say is important to me, so I’d like to take notes. To make sure my notes correctly represent what you say, I would also like to record the conversation. Of course, the recording is private and will only be shared with other team members working on this project. If you have no objections, we’ll proceed with the interview.

✔ If there are no objections, START RECORDING.

Thank you for agreeing to participate in this project and for meeting with me/us today. My name is __________, and I am a Master of Public Administration student(s) at UNC Charlotte. As part of our capstone project, we are evaluating the current board member orientation and onboarding process for the Charlotte Regional Visitors Authority (CRVA). Our goal is to learn what currently works and what CRVA can do to improve its onboarding process.

This interview is voluntary. You have the right not to answer any question, and to stop the interview at any time or for any reason. Our conversation will last approximately 30 minutes, and with your consent, I am recording this conversation. Do you have any questions before we get started?

Background

So, we know you’ve gotten your [Degree] from [Institution] and now you work at [Organization]. We also know you’ve been on the board for [Number] years.

• Have you served on a board before the CRVA? Could you tell me a little bit more about this experience?
• What made you want to serve on the CRVA board?

Pre-Orientation

1. Do you remember what, if any, contact you had or materials you received from the CRVA between your appointment to the board and your formal orientation?
   a. If so, what kind, and did it help you prepare for the orientation?
   b. If not, would you have preferred contact or materials beforehand?
      i. Why would that have been helpful?

Formal Orientation

2. Thinking back to your orientation, could you describe the formal orientation when you joined the CRVA board?
   a. Where was it (e.g. conference room, restaurant, etc.)
      i. Would you say the location was an effective place to host an orientation?
         1. If yes, go to question 2b
         2. If no, what place or type of place would you have preferred?
   b. Do you remember how long the orientation lasted? (i.e. hours, days)
      i. Do you think this amount of time was sufficient to cover and learn the material necessary for your first board meeting?
         1. If yes, go to question 2c
         2. If no, what amount of time do you think would have been necessary to cover the material needed to be prepared for your first board meeting?
   c. Who were the people present at your formal orientation?
i. Were there any other first-time appointees at your formal orientation?

ii. Who conducted and/or spoke at the orientation?
   1. Is there anyone who did not participate in conducting or speaking that you would have liked to hear from?
      a. If yes, who were they and why do you feel like they would have been important contributors?
      b. If no, continue to 2d.

   d. Let’s talk about the format of the orientation. How was the information presented? (PowerPoint presentation, activities, networking, etc.)
      i. Would you say the format/structure was the most effective was to present the information?
         1. If yes, go to question 2e.
         2. If no, what format would you think would have been more effective?
      e. Moving on to the content that you received at the formal orientation. Could you tell me about the information that was covered during the orientation?
         i. If interviewer needs more information, give examples but try not to prime them: different policies, board structure, insurance, roles and responsibilities.
         ii. Of the information you received, what was most useful in your transition onto the board?
         iii. Was there any information that you feel could’ve been covered outside of the formal orientation?

Post Orientation

3. After the orientation, how prepared were you for the first board meeting?
   a. Approximately how long did it take you to feel like you could represent and advocate for the CRVA externally?

4. Is there anything that you know now that you wish you would have known in the first couple of months as a board member?

5. Did you know anyone else on CRVA’s board before joining?
   a. If so, did that help you feel more comfortable with the transition onto the board?
      i. Were you more aware of what to expect?
   b. If not, do you think that having an opportunity to meet other board members would have made the transition easier, or made you feel more welcome?

Reflection/Wrap Up

6. To wrap things please reflect on your experience from time of appointment to first 6 months on the board.
   a. What did CRVA do well to help with your transition onto the board?
   b. Is there anything they could have improved on?

That’s all I have, is there anything else you’d like to add before we conclude?

STOP RECORDING and thank them for their time.
F. CRVA Profile/Aligned Influence

In 2004, the City of Charlotte, NC, merged two entities to become what is now known as the Charlotte Regional Visitors Authority (CRVA). Through this merger, the City was able to bring together management and operations of its publicly owned facilities along with sales and marketing for the City. These City-owned assets and eight brands supported by CRVA with combined values of $500 million, host more than 600 events annually. With 200+ full-time and 1,500+ part-time employees, CRVA also spearheads efforts to “fuel” Charlotte’s visitor economy. Their efforts generate $7+ billion in economic impact to Charlotte and its Metro area, of which $1 billion is specifically from CRVA itself. The visitor economy is vital to Charlotte where one in nine workers in the Charlotte area work in the hospitality industry and over 2 million people visit the Charlotte-Metro area annually.

As one of its 35 boards and commissions for the City of Charlotte, CRVA’s Board of Directors consists of 13 members who, together with the Chief Executive Officer (CEO) Tom Murray, guide the organization’s overall direction. They act as the primary connection between the organization and its external stakeholders. Due to its public structure nominated members must pass a background check and are then selected and appointed by either Charlotte’s Mayor or the City Council (as a whole). The structure of its board membership is:

Mayoral appointees - Four (4) Total

- Three (3) At-Large
- One (1) Representing Limited Service Hotels

City Council appointees - Nine (9) Total

- Five (5) At-Large
- One (1) Representing General Travel
- One (1) Representing Full-Service Hotels
- One (1) Restaurant
- One (1) Representing Mecklenburg County Towns (jointly nominated by all incorporated towns of Mecklenburg County prior to appointment)

Appointees must take an oath of office and are subject to the City Council’s Attendance and Anti-Harassment Policies and Code of Ethics, Gift Policy, and Disclosure Requirements for members of City boards. Each board member serves a three-year term and has a two-term limit. The board is guided by an Executive Committee and members participate in five operating committees: Audit, Budget, Nominating, Strategic Planning, and Visitors Advisory. The full board meets bimonthly with new members coming onboard in June of each year.

CRVA also created a Governance Policy for their board in which they express their board should “direct, protect, and enable.” In directing, board members will develop, manage, and promote assets and relationships to foster the visitor economy and its impact for the Charlotte region. Implementing these actions and decisions of this direction will bear CRVA’s core values in mind: accountability, trust, innovation, inclusion, collaboration, integrity, and engagement. In protecting, the board will ensure any of theirs or CRVA’s staff’s practices, activities, or decisions are not illegal or unethical. Finally, in enabling, board members will be advocates and resource developers for CRVA and will bear in mind the boundaries of their roles and responsibilities to work with CRVA through a state of “Aligned Influence.”

Aligned Influence

CRVA has recently implemented the Aligned Influence Model that focuses on enabling organizations to define roles of their boards and executives and to execute those roles. This is based on a four-step process; checking alignment, getting
aligned, staying aligned, and driving effectiveness. These steps explain three key roles for both the board of directors and the executives of the organization. The board’s role is:

1. to direct the organization in their overall mission and vision,
2. to protect by ensuring that the organization is following legal guidance and operating with diligence; and
3. to enable the organization by setting them up for success.

For the board to be effectively onboarded they must understand these roles in conjunction with individual actions they need to take while serving on the board, policies that enable or disable specific action(s), and the impact of their roles on the wider community and organization.

In order to benchmark the use of the Aligned Influence framework, the MPA team interviewed the Longmont Chamber of Commerce in Longmont, CO. They stated that the organization often uses the framework to have conversations around the role of the board and how their role relates to the overall mission of the organization. These conversations happen throughout the year with one quarter per year focusing on each step of the process. The conversations then lead to actionable items for the board to work on or implement. These items included things like fundraising, community engagement, and actively working to gauge chamber business needs.
G. Onboarding and Orientation

Onboarding is a continual learning process until the board member is at ease and assured with contributing to the board’s operations (Price, 2018). Onboarding and orientation often get used interchangeably, although literature often stresses the differences between and importance of onboarding and orientation. New members seek to know that their input is as important as other well-established members through the onboarding process (Price, 2018; Bauer, 2010). Onboarding begins at recruitment and can last from about three months to a full year as the new board member becomes fully acclimated (Sims, n.d.; Viktorin, & Downs, n.d.). Proper onboarding programs should include tailored information about the new board member’s role and allow them to understand their board responsibility (Cope, 2018; Sims, (n.d.); Lamont, 2008).

Klein and Heuser layout three goals to come out of onboarding: informing, welcoming, and guiding new board members (2008). Informing begins at the recruitment stage of onboarding. This is when new members are supplied with information crucial to understanding how to do well on the board (Klein & Heuser, 2008). Acknowledging the member in the welcoming phase of onboarding done through networking opportunities. Lastly, guiding allows for new members to have a personal guide through onboarding activities (Klein & Heuser, 2008).

An orientation is typically a few hours to a couple of days (Lamont, 2008; Sims, n.d.). Orientation is described as a phase under onboarding in which new hires can quickly learn general organizational information regardless of their role (Viktorin, & Downs n.d.; Lamont, 2008; Sims, n.d). During the orientation process, organizations should share the functions of the organization and clearly differentiate between the roles of board members, staff, and executive positions (Price, 2018).

Each process will help new board members ease into their positions with each period breaking down the generally overwhelming information. New directors will have greater productivity and an enhanced understanding of the organization’s expectations, logistics, and dynamics when they participate in both onboarding and orientation (Patton, 2018; Ha, Hudson & Rehr, 2017; Lamont, 2008). Having both orientation and onboarding has also shown to decrease turnover, increase contentment in their role, and decrease stress (Brown, n.d.; Lamont, 2008; Sims, n.d). Fully functioning board members is the goal after going through onboarding and orientation.
H. Current Orientation Flow and Materials

CRVA provides each new board member with a binder containing printed materials at the start of new member orientation. This binder is around a 226-page document divided into 16 sections focused on understanding CRVA, its board structure, applicable legislation, board policies, and CRVA’s strategic plan. During orientation, a PDF version of the binder’s contents or a PowerPoint of similar material is projected to a large screen and discussed by orientation leaders as new board members follow along in their binder.

The orientation materials the MPA team received, which is similar to an existing board member’s CRVA Board of Directors binder that was shared with us, contained 226 pages with the following sections:

- Message from CEO Tom Murray
- CRVA Officers and Committees
- Committee Charters
- House & Senate Bills
- Public Records and Public Meeting Laws
- Board Attendance
- 2019-2023 Strategic Plan
- Policies & Procedures
  - Rules of Procedure
  - Code of Ethics
  - Contribution Policy
  - Business Entertainment Expense Policy
  - Business Travel Expense Policy
  - Employee Activity Policies
  - Contracting Memorandum
  - Investment policy
- CRVA structure
- Funding and Hospitality Overview
- Insurance Policy Declarations Pages
- CRVA statistics and its impact for Charlotte
- Aligned Influence
- Board of Directors Governance Policy and Expectations
I. Orientation Content

New board members are expected to digest a large amount of information in order to understand the organization and their role within it. Therefore, the content of the board member orientation is a vital component of the process. The orientation must include relevant content designed to get new directors up to speed without overwhelming them with minute details. Materials utilized can be a combination of a hardcopy new member Board of Directors 101 binder, a PowerPoint presentation, and/or an online tool. New board members should receive the binder’s material at, or prior to, orientation.

The content and visual composition of the printed binder that new members received was reviewed by MPA students and mentioned in interviews. While it was noted that the amount of information provided by CRVA was overwhelming, interviewees and reviewers alike acknowledged that all documents included were important to have. Even though the information may be presented in another fashion, having the full text of these documents available, such as the NC House and Senate Bills, are essential to the board. CRVA has done its members justice in continuing to provide these documents year after year.

Harris (2018) and Tysiac (2018) believe that the orientation content should revolve around the organization’s mission statement, risk avoidance, strategic plan, community impact, and financial data. At the Woodrow Wilson International Center for Scholars, all board members are provided an orientation binder including the following information: “job description of duties, organization bylaws, structure of the board and committees, financial data, the most recent strategic plan, and information on organization’s programming and impact” (Tysiac, 2018, p. 24).