



New Board Member Orientation  
Board of Directors  
Revised 2020

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## LETTING GO: THE TRANSITION FROM LOCAL LEAGUE TO STATE BOARD

In many ways, service on the state League board is like service on a local League board—both are multi-issue, nonpartisan, and grassroots-based. At all levels, the League shares the same mission, has more opportunities than resources, and its board members are dedicated, talented, stimulating people with whom it is fun to work.

In other ways, service on the state board differs markedly from service on a local board. There are more procedures for clearance and more editing, which is often a big adjustment for those accustomed to the independence experienced by most local League presidents. There are fewer meetings and phone calls—but lots more email! Instead of being concerned with one small, medium-sized, or large local League, you now must consider the needs of all the members in local Leagues of varying size around the state members whom you seldom or never see. Because the board meets in person no more than four times a year, much of your work must be done between meetings. You must be both a self-starter and willing to take the advice of others before you act.

With a little care, the transition from local League to State Board should be smooth. While all State Board members remain active in their local Leagues, you are bound to have mixed emotions about leaving your League to begin your State Board service. You've nearly worn yourself out making your League an exciting, active, meaningful organization for members and the community. Now, you must let go.

Friends may pressure you to continue to serve on your local board. Although nothing absolutely forbids your doing so, it is a NOT a good idea to accept that local board position. Even if you find that your State Board job is not very demanding at first, please remember that it's the whole enormous state you're now concerned with and thousands of League members and Indiana citizens need your skills and knowledge.

As a member of the State Board, **you are expected to give your state League responsibilities priority over your local League obligations.** Serving on both the State Board and your local board simultaneously may result in conflicting priorities and stressful competition for your time and energy. Consider limiting your local League activity to non-board tasks. There are always plenty of opportunities to help your local League without being on the board!

By all means, attend local League meetings and other events, but, as much as possible, refrain from being your local League's State Board resource person. Staying off the local board, refraining from advising on everything imaginable, and allowing new local leaders to assume responsibility will help make your relationship with your local League a comfortable and productive one.

## **TAKING HOLD: YOUR FIRST MONTHS ON THE STATE BOARD**

"Letting go" as a local League leader is a gradual process. How nice it would be if "taking hold" were also gradual! The following orientation to your first months on the board and your first board meeting may help you adjust more easily.

Gradually, you will learn how much time you can devote to community activities while carrying out your State Board responsibilities. The state League does not ask that you ignore your job or your family, but we do hope that you will make State Board service your major volunteer activity, or at least one of your most important volunteer activities!

### **Terminology**

If you thought the League overindulged in acronyms before, wait till you start reading board correspondence and listening to board members' conversations! Brush up on your program acronyms by consulting the League Lingo document.

Learn to recognize the state League by all its names and acronyms. The League of Women Voters of Indiana is also known as the state League and LWVIN. Please note that League is always capitalized. State Board members like to save time by writing and speaking in jargon and abbreviations. Board members are sometimes referenced by their initials (see past president Karen Kay Leonard or KKL). Acronyms for State Board members only are used to simplify intra-board communication. Do not presume that members and the public know what we are talking about. Use jargon and acronyms judiciously for other audiences and always explain each term the first time it is used.

### **Things to Read First**

- League Basics, the LWVUS publication, is the best introduction to the League.
- State Board Handbook
- Policies and Procedures of LWVIN
- LWV Education Fund and the Local League
- LWVIN Positions

After your appointment to a board committee, make contact with your predecessor to arrange transfer of the files. Don't panic at the number of file boxes or electronic records you may receive but derive comfort from the fact that they (should) contain a history that will make your job easier. Resolve firmly at that moment to continue your good filing habits or to mend your ways if you are more of a "piler" than a filer.

### **Your "Co-workers"**

At the summer board meeting, each board member will be appointed to serve on a board committee. Appropriate officers chair the committees. Committee chairs provide guidance,

should be consulted before undertaking most activities and need to be informed periodically about committee members' work.

While the president is always available to board members, League members, the world, etc., she/he is unable to oversee directly everyone's work. The committee system works best when committee members make every effort to work through their committee chairs. The president will do the same. Also, talk to your predecessor(s) as often as needed to make use of their experience and obtain necessary guidance.

Last, but not least, remember State Board members are leaders of the state League, which is composed of hundreds of members, who may call on you for help (or to complain) before your feet are even wet! Be helpful, but don't be embarrassed to ask your committee chair, the president, or past board members for guidance when you are not sure how to proceed. feet are even wet! Be helpful, but don't be embarrassed to ask your committee chair, the president, or past board members for guidance when you are not sure how to proceed.

## YOUR JOB AS AN LWVIN BOARD MEMBER

All board members share responsibility to:

1. Participate in setting priorities and policies of the LWVIN as a whole.
2. Attend Board meetings regularly (see bylaws for attendance rules).
3. Accept primary responsibility for a specific area of League work (portfolio), working within policy guidelines set by the Board, recruiting other League members to assist as necessary.
4. Identify and train future League leadership on your committee, at state meetings, and in your local League.
5. Assist other Board members in their portfolio areas when asked.
6. Maintain voucher copies, files, and records of activities as specified in other policy guidelines.
7. Follow in all state League activities the policies, procedures, and guidelines in the bylaws, policy statements, and publications of the LWVUS and LWVIN.
8. Accept non-portfolio duties assigned by the Board or President, such as serving as a consultant to local Leagues and conducting Board training for local Leagues.

What to do before your first Board meeting:

1. Obtain and go through Board policy statements.
2. Participate in any Board training offered.
3. Get files for your portfolio from your predecessor and/or the state office (copies) and familiarize yourself with them. Meet or at least telephone your predecessor (or President or Vice-President, if there is no predecessor) and learn all you can from her/him. Have her help you make a work calendar for yourself, noting all deadlines you are expected to meet during the League year.
4. Learn office procedures like submitting vouchers for your expenses.

If possible, visit the state office and review various files there. (Call ahead to make sure it will be open.)

5. Obtain from the state office and familiarize yourself with the tools provided for your job. These include the "how-to" publications of the LWVUS. Check state and national publications catalogs at the office to be sure you have copies of all publications useful to you.

6. Ask the Board, local League President, and others for help in recruiting a committee or in enlarging or revitalizing an existing one if needed for your portfolio.

What to do at Board meetings:

1. Be on time.
2. Plan to stay through the entire meeting.
3. Report to the Board plans made by you or your committee. Give the Board Secretary a written summary for the minutes, if possible. Ask for Board suggestions and authorization to carry out the plans as approved by the Board; present motions as necessary. Do not ask the Board to do your committee work for you; bring recommendations.
4. Write down decisions and commitments involving you.

What do to between Board meetings:

1. Carry through with anything you have agreed to do and meet your promised deadlines.
2. Check your work calendar and note pertinent deadlines. Plan portfolio work early enough ahead to get Board input at the next meeting, if needed.
3. Keep in close touch with your committee members.
4. Call the President to reserve time on the agenda when you have something to report. If you absolutely cannot attend, notify the President and send your report ahead of time.

## **BECOMING AND STAYING INFORMED ... AND INFORMING OTHERS**

### Materials and Supplies

While you are conducting League activity, it may become necessary to use supplies such as name badges, envelopes, labels, stationary, folders, etc. You should first check with the League office to inquire if supplies are available before you purchase them. To be reimbursed for an expense related to League activity, you will need to fill out a reimbursement form and submit it to the Treasurer.

### League Publications Needed for Your Files

Board members will find documents contained in the League Handbook available at the state office, online, or through the League's e-file sharing system. Each year, LWVIN will update files as needed. You will find copies of the Indiana Voter and e-Voter helpful and past publications are available at [www.lwvin.org](http://www.lwvin.org). LWVUS Publication Impact on Issues will be purchased for you by the state board when it becomes available every two years. The LWVUS website ([www.lwv.org](http://www.lwv.org)) is a helpful resource as well.

### To File or Not to File

Each board member must decide how to organize information in a manner best suited to her/his working style. Because board members now receive most information via email, an electronic filing system may be best. Others may feel a need for a paper filing system. Any system should be simple to use and easy to access, and one which your successor will be able to use as easily as you do. Although it is not necessary to save everything, files should, at a minimum, contain information related to each board member's responsibilities. Voters, E-Voters, board meeting minutes, agendas, legislative updates, and convention and council workbooks are examples of materials generally of long-term use. Materials relating specifically to your board position will also prove useful to you, and to the people who serve in that position in the future.

### Communications with the Board, Staff, Leagues, and the Public

Good communication is essential to the effectiveness of any organization, so it should come as no surprise that the League has a vast communications system that requires much more of you than just getting the right tools into your files.

### Deadlines

Refer to the official LWVIN Calendar for most deadlines. Additional deadlines will be set at board meetings. Submitting items on time makes it easier for other board members and the staff to manage their busy work schedules. Because of technology, we are able to produce documents much more quickly than in the past, but this necessitates that board members keep in touch and meet deadlines promptly.

### Email

In general, the "to:" has names from whom a reply is needed. The "cc:" includes those who need the information. The President is cc'd much of the time. The President does not need to be included in work of the committees but does need to be cc'd as the work is being finalized. With a few exceptions (like PMP invoices), mail should not go out to a large group of local Leagues or members unless the President has seen it.

### Board-Related Business and Mailings

You will receive, beginning with your first board meeting:

- Agenda
- Documents Supporting Agenda Actions
- LWVIN Minutes
- LWVIN Treasurer's Reports

In addition, you will receive

- Periodic memos from the President
- Legislative Action Updates
- Contact Information for local League Presidents, Program Chairs, and other leaders
- Memo from the State Office staff

## **THE STATE OFFICE: WHAT IT IS AND WHAT IT DOES**

The League has employed a variety of different office personnel, from an executive director, full and part time office manager, and accountant. We have also employed a company who represents many different nonprofits to handle our day-to-day affairs. Currently, the League is in transition and will be deciding if we should hire a full or part time staff member and what hours that person might work.

The League rents office space from Indiana Humanities at the Meredith Nicholson House, located at 1500 North Delaware, Street, Indianapolis, Indiana, 46256. Our office is on the first floor and consists of a desk, desk chair, office equipment, and display rack. We also have storage space in the garage located behind the house. The President, Treasurer, and one board member have a key to the office (for after-hours entry) and the office is accessible during operating hours for Indiana Humanities via a passcode.

The League office and storage area houses supplies, publications, current local and state League files (older files are sent to the Indiana Historical Society for our archives), boxes of new publications, and League brochures. The office has a projector and printer, as well as League banners for state events and are available to local Leagues for their use.

If the decision is made to hire staff for the state office, this description will be revised.