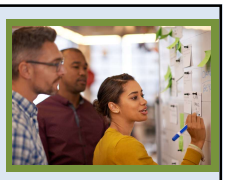
National Center on
Program Management and Fiscal Operations



Guiding Success: The Power of Orientation in Leadership and Governance

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Your Presenters Today



Steph Melhalf
Grantee Specialist

Megan Larsen
Family Engagement Specialist





Terina Taulogo
Grantee Specialist

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Learning Outcome

Upon completion of this session, participants will be able to:

- Identify 6 elements of organizational effectiveness
- List one or more strategies to support board orientation activities.

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3

6 Elements of Organizational Effectiveness



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Orientation and Onboarding



	Orientation	Onboarding
General Focus	Board/PC member's role at the organization	Fully engage Board/PC member in the organization
Duration	One-time event	Ongoing: six months to a year
Set-up	Conference-style or online	On the job
Content	General overview	Specifics for each new Board/PC member
Outcome	New Board/PC member is ready for work	New Board/PC member is ready to be productive

5

Cornerstone Quote



6

Purpose



To provide important information about the organization and the board's roles and responsibilities

To build working relationships among board members. These relationships promote ongoing support and consensus on how they will carry out their duties.

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Purpose (Cont'd)

Purpose: An organization's reason for being in the world. Purpose melds the mission and values in pursuit of the organization's vision.



Mission — An organization's role in working toward its vision

Vision — The desired future state

Values — Principles and beliefs that guide how an organization executes its work

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Why Do We Orient?



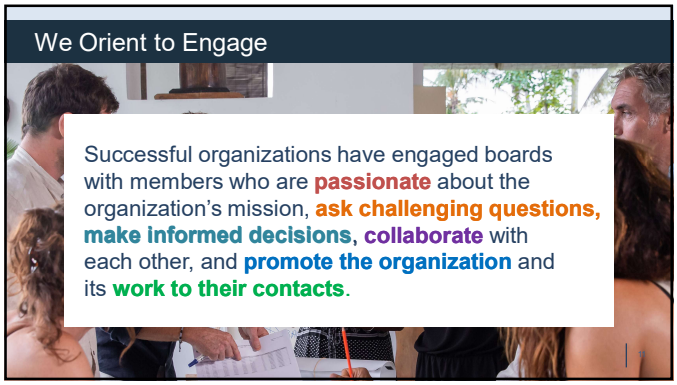
- To initiate members to board service
- To introduce the organization, its mission, and programs
- To get to know other board members
- To form a foundation for future service
- To understand their relationship with Policy Council

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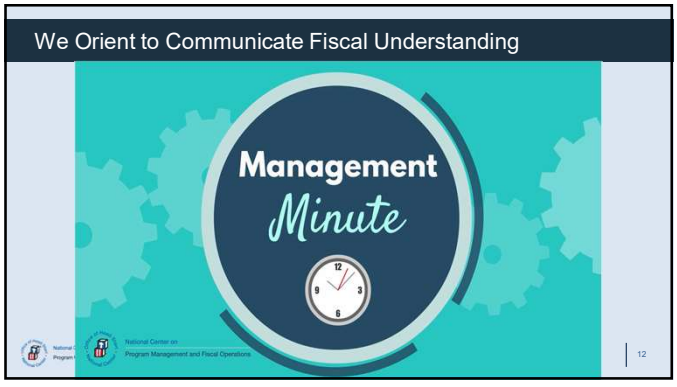
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Why Do We Orient: Current Research
49%
Do not establish trust with the communities they serve
32%
Have knowledge of the community served
28%
Have membership within the community served

10


We Orient to Engage
Successful organizations have engaged boards with members who are passionate about the organization's mission, ask challenging questions, make informed decisions, collaborate with each other, and promote the organization and its work to their contacts.

11


We Orient to Communicate Fiscal Understanding
Management
Minute

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Characteristics of an Engaged Board



Adapted from *BoardSource*. (2017). *Facilitating an Engaged Board*.

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Head Start Program Leadership



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Head Start Leadership

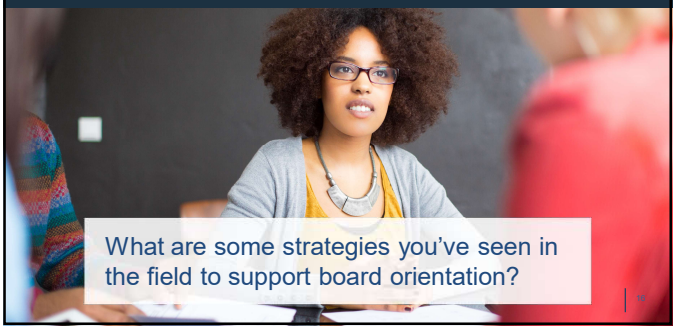


- The management staff's day-to-day activities and operating reports inform decisions made by the Policy Council and governing body/Tribal Council
- The Policy Council plays a crucial advisory role in guiding program direction
- The governing body/Tribal Council's legal and fiscal oversight builds on the management staff and Policy Council's unique insight and perspectives
- The three entities of Head Start leadership work together to support grant recipients on their five-year journeys, particularly around program planning

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Let's Chat:



What are some strategies you've seen in the field to support board orientation?

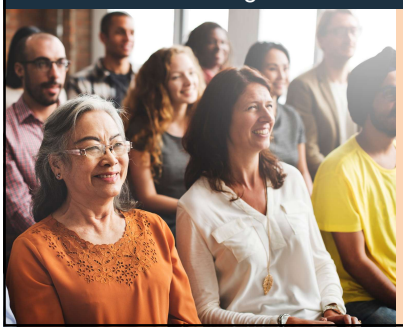
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We Orient on Head Start's Timeline



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We Orient to Strengthen Community Relationships



- Allocate Time
- Build Community Voices
- Ground Decision Making
- Deepen Connections
- Bring Networks
- Reframe Accountability and Success

18


We Orient to Leverage Partnerships

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We Orient to Understand Performance Standards Training Requirements
HEAD START LEADERSHIP AND GOVERNANCE
HOME | RESOURCES
Navigation Tips
Head Start Vision, Values, and Mission
Head Start Law and Regulations
Your Team
Your Tools
Be a Leader
Final Assessment
Available
Started
Finished
HEAD START ACT
Head Start Program Performance Standards
CFR
Electronic Code of Federal Regulations
Uniform Guidance
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We Orient on Board Training Requirements
A board retreat is a workshop dedicated to aligning your nonprofit's goals and creating consensus.
—Giving USA
ons

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We Orient on ERSEA Training

1302.12 Determining, verifying, and documenting eligibility.

(m) *Training on eligibility.* (1) A program must train all governing body, policy council, management, and staff who determine eligibility on applicable federal regulations and program policies and procedures. Training must, at a minimum:

(i) Include methods on how to collect complete and accurate eligibility information from families and third party sources;

(ii) Incorporate strategies for treating families with dignity and respect and for dealing with possible issues of domestic violence, stigma, and privacy; and,

(iii) Explain program policies and procedures that describe actions taken against staff, families, or participants who attempt to provide or intentionally provide false information.

(2) A program must train management and staff members who make eligibility determinations within 90 days of hiring new staff.

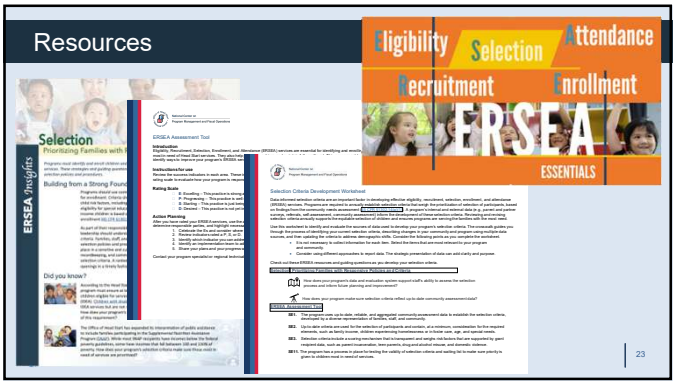
(3) A program must train all governing body and policy council members within 180 days of the beginning of the term of a new governing body or policy council.

(4) A program must develop policies on how often training will be provided after the initial training.

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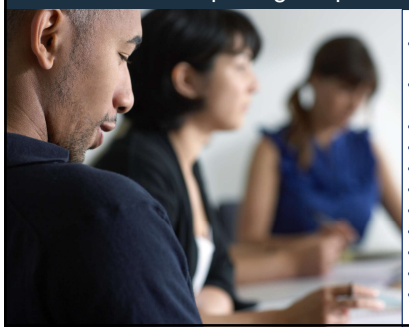
Resources



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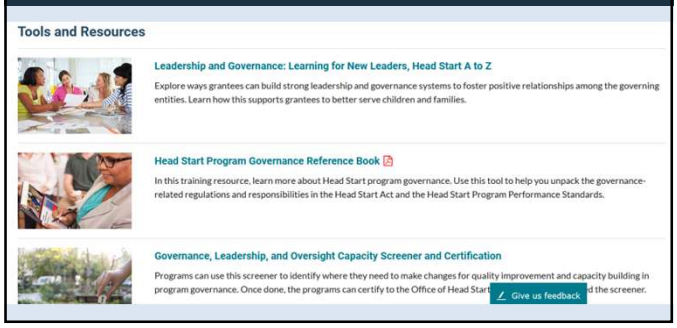
We Orient on Reporting Requirements



- Financial statements, including credit card expenditures
- Program Information Summaries
- Enrollment
- USDA nutrition reports
- Financial Audit
- Self-assessment
- Community Assessment
- HHS Secretary Communication
- PIR
- School Readiness
- Ongoing Monitoring results

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Head Start.gov Tools and Resources



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We Orient on The Board's Role in Advocacy



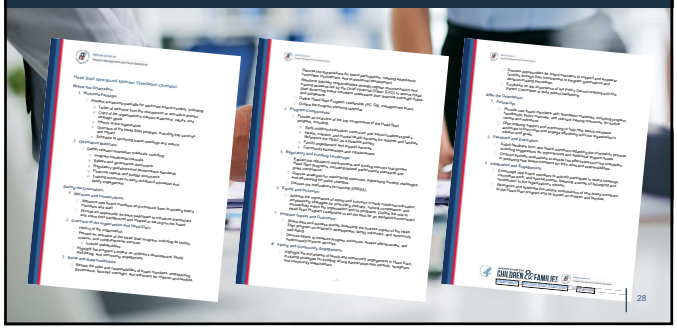
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Let's Chat



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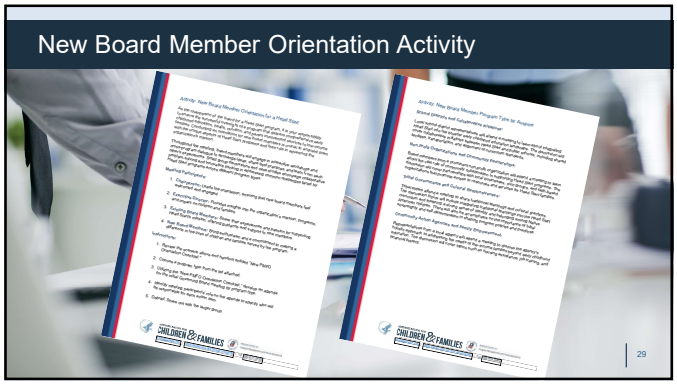
PMFO: New Board Member Orientation Checklist



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New Board Member Orientation Activity



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Beyond the Board Orientation

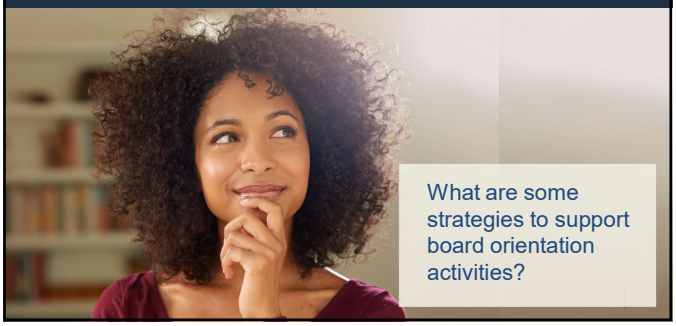


- Create a communication plan
- Leverage technology
- Assign action items
- Invite board members to attend events
- Encourage feedback
- Advisory committee meetings

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Reflections



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Key Resources



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Thank You…



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