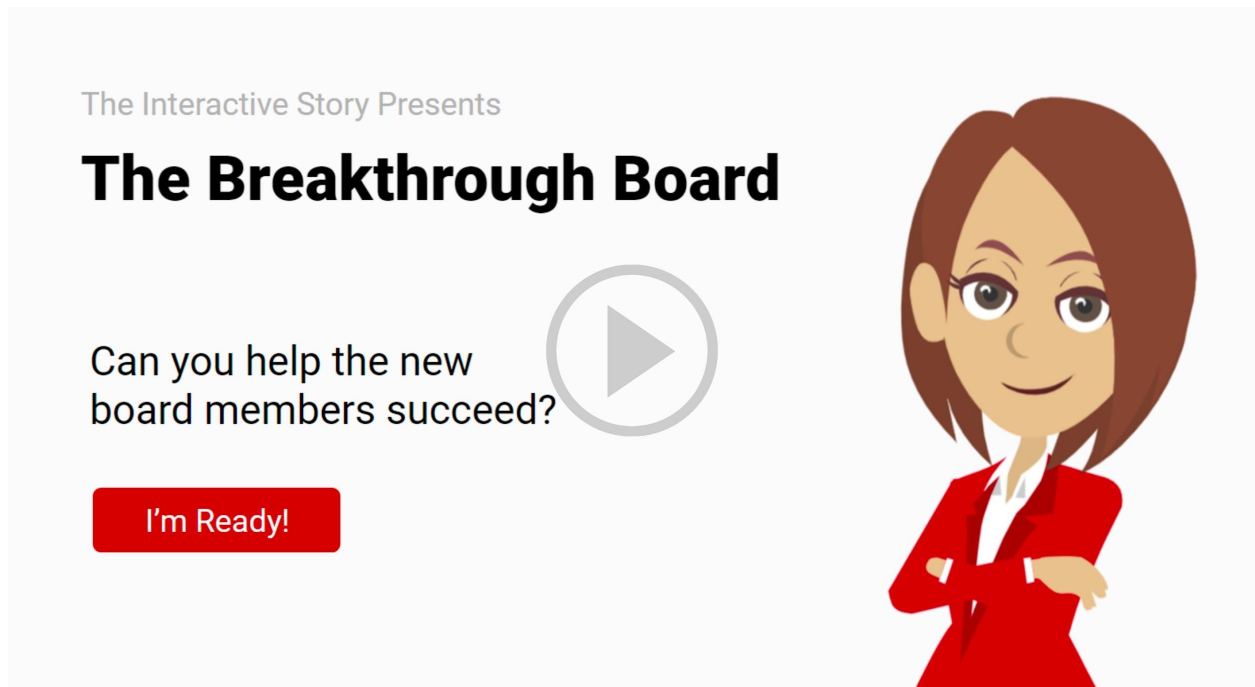


New Board Member Orientation Experience (Guide for ATD Chapter Leaders)

The New Board Member Orientation Experience was originally developed by Kimberly Goh of TheInteractiveStory.com for the Association of Talent Development Orange County (ATD-OC).

It can be used as a starting point for other ATD Chapters who want to train incoming board members on basic topics such as board operations, budget preparation, email setup, and member benefits.

First, watch this video for a quick introduction (5 minutes):




The Interactive Story Presents

The Breakthrough Board

Can you help the new board members succeed?

I'm Ready!



The image shows a video player interface. On the left, there is a play button icon and a red button labeled 'I'm Ready!'. On the right, there is a cartoon illustration of a woman with brown hair, wearing a red blazer over a white shirt, standing with her arms crossed. The text 'The Interactive Story Presents' is at the top left, and 'The Breakthrough Board' is the main title. Below the title is the question 'Can you help the new board members succeed?'.

The Orientation Experience consists of three parts:

- 1) **Chapter Leader Review and Preparation:** Review the [Orientation dashboard](#) to see if this is a good fit for your Chapter. Note which topics you think the board members should focus on, and which ones they can skip. Customize the experience for your board members by creating a *Chapter 3: Additional Instructions Document* to distribute at the kickoff meeting.
- 2) **Kickoff Meeting:** Hold a kickoff meeting (usually in the fall) to introduce incoming board members to the Orientation Experience. Explain the difference between the Orientation dashboard and how things are done in your own Chapter. Email or distribute any supplemental training material you've created (see *Chapter 3: Additional Instructions Document* below).
- 3) **Orientation Module Completion:** Incoming board members go through the Orientation at their own pace, so they can get up to speed before they officially join the board in January. They are responsible for keeping track of their own progress through the Orientation (they can print a topic checklist from the dashboard).

Dashboard Navigation

To accommodate people's busy schedules, modules are short (3 - 5 minutes each). Navigation has been left open so it's easy for people to jump to specific topics for review. There are no quizzes or knowledge checks; instead people complete practical exercises that simulate on-the-job-activities.

For the best experience, it is recommended that the dashboard be viewed on a desktop computer. However, it will also work on a mobile device.

Orientation Dashboard Contents:

The dashboard can be found at <https://theinteractivestory.com/atd>

Chapter 3 material is to be provided by local ATD Chapter leaders and will **not** be distributed through the dashboard (see *Chapter 3: Additional Instructions* below).

The Orientation dashboard and modules cannot be modified by individual ATD Chapters. These topics are simply provided as a starting point for Chapter Leaders.

However, Chapter Leaders can use a variety of methods to customize the Orientation Experience, as described in the sections below.

How to Create Your Chapter 3: Additional Information Document

You'll notice on the [Dashboard](#) that Chapter 3 material has been left blank. You'll need to create a *Chapter 3: Additional Instructions Document* that you can email to incoming board members before Orientation begins.

This PDF, Google Doc, or Word document might include:

- 1) Policies and procedures that you want incoming board members to follow
- 2) Links to screen recordings showing how to navigate your Chapter's website
- 3) A list of Frequently Asked Questions for Board members
- 4) Anything else that will help incoming board members do their jobs well

Guidelines for creating the *Chapter 3: Additional Instructions document*:

- 1) Only include information people actually need when serving on the board. "Nice-to-know" information should be emailed after Orientation is complete.
- 2) Don't include information that might change each year (such as people's contact information or board meeting schedule). This information can be emailed separately or discussed at the kickoff meeting.
- 3) Use a tool such as Zoom or GoToTraining to record online demonstrations
- 4) Store the Additional Information document in a central location so it can easily be updated every year.
- 5) If you want to provide training for specific roles, send that in a separate document tailored specifically for the person who has that role
- 6) Include the New Board Member Orientation kickoff as part of your Chapter's calendar of administrative tasks to be completed before the end of the year.
- 7) Review these guidelines with your current board members to gather ideas on what should be included in the *Chapter 3: Additional Instructions Document*.

Recommended Next Steps:

Sometimes a low-tech approach is best. It is easiest for most Chapter Leaders to create a PDF or Google Doc for their *Chapter 3: Additional Instructions document*, and email it out before Orientation begins.

Additional eLearning modules are not required.

Chapter Volunteer eLearning Development:

However, if you have a volunteer eLearning Developer in your Chapter, you could ask them to build out additional eLearning modules to supplement those provided in the Orientation Dashboard. Suggestions and resources are provided below.

You could then include links to these supplemental eLearning modules in your *Chapter 3: Additional Instructions document*, or embed the training in a protected section of your website.

Here is some background for eLearning developers:

- 1) For reference, the Orientation Modules were developed using the tools Storyline 360, Camtasia, Audacity, BeFunky.com, and FreePik.com.
- 2) Story files and templates from the original Orientation modules are not available for individual Chapter use. However, Storyline 360 has an extensive library of characters, templates, and illustrations to help you get started. They offer a 60-day free trial and provide [excellent training](#).
- 3) When development was finished, the source files (.story) were delivered to the Chapter Leaders for future maintenance purposes. (Note that Articulate RISE currently does not allow source code files to be stored without a subscription, which is why we chose Storyline 360 as our development platform).
- 4) Object code files were uploaded to the ATD Chapter's Google Cloud Console as described in this [Video](#) to generate public links
- 5) For these kinds of training programs, it is probably not critical to track learner progress with an LMS. Instead you can embed the links on a protected page of your website and grant incoming/current board members access to that page. Ask people to track their own progress.

If you are getting started with eLearning, check out these resources:

[eLearning Resources \(books, tools, and courses\)](#)

[Interactive video development](#)