Using New Member Orientation to Boost Engagement on Your Nonprofit Board of Directors

INTRODUCTION

The secret sauce of board engagement is ensuring that individual board members feel valued and included, know that their contributions of time and effort are making a difference, and understand what is expected of them from the beginning. That's why the orientation process is so crucial. It provides the information people need to be effective in their board role.

THREE PILLARS OF BOARD ENGAGEMENT

- Recruitment – getting the right people on the bus
- Orientation – making sure they know what is expected
- Individual Relationships – one on one discussions and agreements

ORIENTATION IS NOT:

- Lunch with the executive director.
- A link to the shared drive
- An invitation to a board meeting prior to election.

Orientation IS:

A special meeting where veteran board members teach newcomers what they need to know in order to serve effectively on the board.

WHY RUN AN ORIENTATION PROGRAM?

- To engage new board members from the beginning and increase the chances they will remain engaged throughout their tenure.

- To save time and effort over the long run by getting newcomers functional quickly and avoiding problems caused by disengagement
- To build or move organizational culture by emphasizing values and setting expectations.

WHO IS RESPONSIBLE?

- Orientations are board member to board member events.
- Program and materials should be developed and led by the Governance Committee.
- Staff play a support role for discussing programs, facilities, and management structure.

WHEN SHOULD ORIENTATION BE CONDUCTED?

- Prior to starting board service if possible.
- Soon after the newcomer's first board meeting.
- Make sure everyone blocks out enough time.

WHERE SHOULD THE ORIENTATION BE HELD?

- In-person at the organization's office or program site.
- In-person at the home of the Governance Committee Chair or Board President.
- Virtually, when all can see a shared screen and hear each other.

WHAT SHOULD BE COVERED?

There's a lot of material to go over in an orientation, so make sure new board members know where to find the information again later on: how to access the shared file of documents and who to call with questions. We've broken the information into four categories: governance, culture, the board's role as ambassador, and expectations around fundraising.

CONCLUSION

Long considered a "best practice" in effective nonprofit governance, the process of providing a solid orientation to newly-elected members of the board is often neglected, especially among smaller, unstaffed organizations. Done well, that orientation session can be the start of a long and productive relationship between the board member and the organization.

ITEMS TO REVIEW WITH NEW BOARD MEMBERS:
THE BOARD DOCTOR'S CHECKLIST

Governance	
	Legal duties of board members: care, loyalty, compliance
	Legal documents: articles of incorporation, bylaws, tax status, state registration, IRS 990
	Role and responsibilities of the board – difference between governance and management
	Role of officers and overview of committees – leadership, key annual responsibilities, what reports to expect
	Budget/financial reports – key revenue and expense lines, how to read reports, internal controls
	(If applicable) most recent audit report
	Board policies: conflict of interest, code of ethics, confidentiality of proprietary information, whistleblower provisions, etc.
	Board planning documents: strategic, succession, development, advocacy, outreach
	Minutes of last few meetings, together with attachments.
	Board as employer: CEO contract, evaluation process, compensation decisions
Culture	
	The values we uphold and center in our work together
	How we conduct meetings – expectations for preparation and comportment, use of consent agendas, role of chair
	How we make decisions – getting a question on the agenda consensus or majority vote, minutes
	Internal communications – between-meeting reports, board packet materials, portal or emails, expectations for responsiveness

	How we use our tech – portal, shared drive, CRM (data access), Videoconferencing
	How we evaluate the effectiveness of the board and individual board members.
	How we relate to staff and/or other volunteers
	Special provisions for board members also serving as program volunteers.
The Ambassador Role	
	Our mission, vision, value proposition, strategic goals, history and recent accomplishments
	Programs – what we do, enrollment, how outreach occurs, accomplishments of participants
	Facility Tour – where we work, the people who conduct our programs, the people we serve
	How we tell our stories: recent successes, why we exist, urgency
	Annual Report
	Staff/volunteer table of organization
Fundraising	
	Description of expectations – provisions for board giving, role in fundraising
	Our case for support – how much money is needed for what purposes, why people should give, how people can give
	Fundraising policies – use of donor data, gift acceptance
	How the organization supports board member fundraising
	Board's role in implementing development plan
	Individual board member fundraising agreements