Orienting New Board Members

Board members report higher satisfaction when they participate in a formal, in-person orientation. The orientation process is key to bringing new board members up to speed, and helps them quickly become engaged in your board. It's a useful opportunity to make sure board members understand how the board works, how the organization works, and how they can best contribute to its success. Just like hiring a new employee, there are many ways to help orient and welcome a new board member. View and download printable version of Orienting New Board Members.

Designing an Effective Board Orientation

Many boards hold a board orientation session to train new members about the organization and serving on the board. An important element of orientation is providing a personal view of your services in action. Take new board members on a tour of your facilities, introduce them to your clients if appropriate, and let them see what your mission really looks like. This is also a great opportunity for the new members to ask questions to better understand how they support and strengthen the organization through the work of the board.

Tips to structure an effective and engaging orientation session:

TIP 1: Use the Table of Contents of your board manual as the outline for your agenda. The board manual should contain the categories of information that you will want to cover, and reviewing the contents for questions is a good use of your time. You can also create discussion questions that relate to the sections, which can engage new members in the type of critical thinking you want them to use on the board.

TIP 2: Involve key staff. To help familiarize the board with your day-to-day work, bring in your program director or other person who coordinates your efforts. The staff that do the everyday work of the organization can answer questions with great depth and also help connect the work the board is doing to the final services the client receives. Similarly, introduce new members to the CFO, the Development Director, and other staff with which they are likely to work.

TIP 3: Use the buddy system. Consider using a board mentorship program and invite the mentor to attend the orientation with the new member. This will help the two board members build a relationship and also help the mentor focus their communication based on what the new member knows and has the most questions about.

Board Manuals: Theory and Practice

Board manuals, also often called board notebooks, can be a key resource in facilitating the work of a board member. They can be **used as the basis for an orientation training session**, allowing time to review the contents and for the new board member to ask questions.

Board members should receive a manual when they join the board and be encouraged to **use it to track or manage all of their work.** The contents can assembled in different sections within a binder so that board members may insert and remove pages as needed, as well as keep their meeting notes or minutes in one place. Contents can also be shared electronically through a section of the organization's website, posting on a shared document system, or simply emailed as a PDF. Greenlights' members can find a sample board manual materials in the 501(c)ommunity (log-in required).

The content of each board manual is different. This sample Table of Contents may be used as a guide for updating or creating your own board manual. For an organization with complex programs, the manual may include more information on such programs and services, whereas a nonprofit with more complex governing systems may need to go into more depth about how the board does its work.

Board manuals often include:

- General information about the organization
- The specific governing documents of a board
- Planning documents for both the board and the nonprofit
- Other information for members to reference throughout their tenure

Much of the content, such as development plans, staff rosters and bios, or organizational charts, should be managed by staff and shared with the board via the manual. When not created by staff, the board manual is often created and managed by the Governance or Nominating Committee. Also, committees, officer roles and board rosters will likely change annually. When changes are made, they should be incorporated into the new manual and made available to all board members.

It's important to keep the manual updated. The impending addition of a new board member is a great reminder to check the governing documents and policies, as well as general information about the organization, for accuracy. If there is significant change in the manual—or if it has been several years since the last updates—you may choose to create new manuals and redistribute to the entire board at once. This is an opportunity to check for agreement or new ideas on the effectiveness and efficiency of board operations.

Board Member Agreements

A board member agreement is a great way to manage accountability. By signing a succinct document of expectations, board members acknowledge and agree to follow an appropriate set of actions and behaviors. This helps ensure that each board member contributes in a valuable manner and, in the case of a violation of the agreement, sets up a framework for addressing the situation based on objective criteria rather than opinion or feeling.

Board member agreements should match the requirements outlined in the bylaws, but it should also describe the expectations of board members in shorter, more succinct and less formal language.

Board member agreements should include:

- Expectations for attendance at meetings and participating in events
- Requirements for fundraising
- Roles in representing the organization
- Means of communication between board and staff members
- General agreement on conduct when working with board and staff members
- Expectations for levels of engagement with the nonprofit and board's work

Many board agreements also include an explanation of what board members can expect from the organization:

- The materials and support needed to effectively meet board expectations
- Expectations for conduct of other board and staff members
- Expectations for communication from staff and other board members
- Opportunities for the board member to engage more deeply in the organization
- Carrying of Directors and Officers Liability Insurance

It's also prudent to include the consequences of failing to meet these expectations. Check out this sample agreement and think about whether there are aspects of it that you can apply to your current agreement. Or if you don't have a set agreement, modify the sample to meet your needs.

One added benefit of a board member agreement is that it can **include metrics by which board members can measure themselves** when the time comes to evaluate performance. Moreover, you can track your overall board performance in an aggregate form on a dashboard to measure your progress. This gives a clear picture of how the board is functioning as a whole without identifying specific members individually.

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