

On-Boarding – Or Board Orientation? Welcoming New Board Members

The process is too crucial to approach without careful planning.

By Mike Burns

Yes, indeed, “on-boarding” has become the latest buzzword for what many of us older folks refer to as “board orientation.” Language aside, it’s important to do something to orient new board members to their new positions.

One hint: Attending their first board meeting the day their term begins isn’t the best approach (albeit commonly practiced) for introducing a new board member to the board.

A second hint: While the norm has been to “shop” for board members within board members’ networks, instead consider recruiting from volunteers already active within the organization or recruit individuals to board committees, where prospects can get their feet wet while demonstrating their potential as board members.

The work of board members is transactional (discussions, decisions, actions) and relational (the fuel that makes transactions comfortable and effective). A board orientation should be about building relationships as much as about providing information for being an effective board member.

Have These Tools in Place

The core to effective on-boarding is to consider putting the following tools in place:

- **a meet-and-greet event** where current board members meet incoming board members with some formal and informal activities
- **a mentoring program** that matches current board members to incoming board members
- **a board manual** that includes details such as: the organization’s theory of change; mission and values; strategies and goals; program overview; current budget; current year/quarter budget versus actual; current year/quarter profit/loss.

“A board orientation should be about building relationships.”

Give New Board Members These Things

On board members’ first day, give them:

- **a list of board members;** a board agenda and board reports; board meeting rules of order and calendar of meetings; six-months of board minutes
- **a conflict of interest statement** and a board responsibilities statement (including the amount of money board members are expected to give to the organization each year)
- **bylaws,** articles of incorporation, IRS letter, recent tax return
- **directors’ and officers’ liability insurance policy,** commercial liability insurance policy, investment and diversity policies, whistle-blower and related risk management policies.

Keep These Keys in Mind

How you conduct the orientation is as important as what materials you give new board members.

Here are some strategies that will help:

- **Formally structure** the on-boarding session to ensure that an incoming board member will become knowledgeable and even conversant in the ways and culture of the board and nonprofit.
- **Incorporate learning styles** using all the senses (yes, food matters).
- **Ask a variety of people** to help present the orientation. It’s traditional to have the CEO and board chair (or governance committee chair) conduct the on-boarding event. But experience indicates that it’s better to include as many members of the current board, as well as senior staff and even programming staff, as possible. Having them present their stories will provide the new board member with a warmer welcome and an added depth and insight that might not be present with just two or three presenters.
- **Instead of making lots of paper copies** of all the materials board members will need both for orientation and continued transactions, consider going live and creating a board portal or subscribing to a board portal service like Board Effect. You’ll save trees and reduce members’ needs to carry around reams of paper to do their jobs.

“You’ll save trees and reduce the need to carry around reams of paper.”



please get in touch...

The first principle of on-boarding: Do it. Make the introduction to your new board members an experience that will serve them throughout their tenure. **S**

We would love to hear your response to anything in **Nonprofit World**, your comments about any aspect of the nonprofit sector, and your concerns about your daily work. Please get in touch in any of the following ways:

Mike Burns (mikeb@bwbsolutions.com) is a partner at BWB Solutions (bwbsolutions.com), a national consulting firm with expertise in planning, governance, organizational assessment, and finance. Each partner at BWB Solutions has unique strengths in core nonprofit disciplines. Since 1994 Mike has supported nonprofits through organizational change and planning, particularly with regard to strategic and sustainability planning. He has a master’s degree in nonprofit management from Lesley College and a graduate certificate in nonprofit marketing management from the University of Hartford. He is a contributor to NonProfitPro (nonprofitpro.com), where this article was first published.

Drop us a note at: Letters to the Editor, Nonprofit World, P.O. Box 44173, Madison, Wisconsin 53744-4173.

E-mail to: muehrcke@charter.net

Please include your name, organization, address, phone number, and e-mail address. If you’d like your comments to appear anonymously, please let us know. We look forward to hearing from you!

Get Everyone On Board

For more perspectives, see articles such as these at NonprofitWorld.org:

How to Prepare Board Members to Govern Effectively (Vol. 25, No. 6)

Got Bylaws? (Vol. 26, No. 4)

Using Board Portals to Keep Directors Connected (Vol. 29, No. 3)

Reciprocal Board Agreements: What Do Board Members Give? What Do They Receive in Return? (Vol. 28, No. 1)

Great Policies & Procedures for Your Organization (Vol. 31, No. 5)

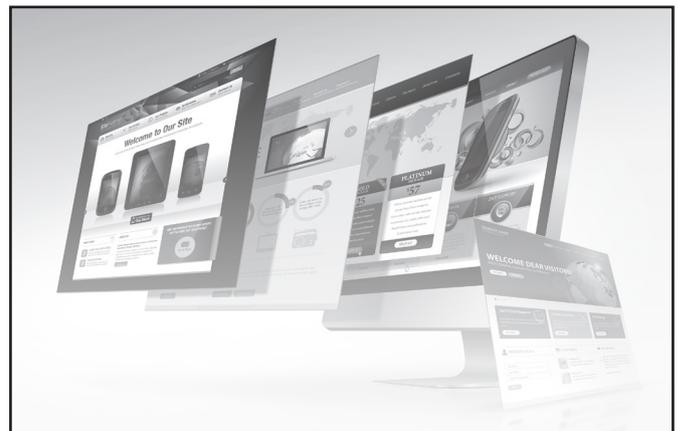
How to Solicit Your Board: Rules for Success (Vol. 35, No. 4)

Planning the Board Orientation: 12 Key Messages (Vol. 34, No. 4)

Tools for Improving Your Board’s Diversity (Vol. 25, No. 5)

Can Standing Committees Contribute to High-Impact Governing? (Vol. 25, No. 2)

How to Improve the Process of Change: The Sanctuary Model (Vol. 28, No. 6)



WHAT’S UP ONLINE?

Would you like to discuss some of the issues addressed in **Nonprofit World** with other nonprofit professionals? Do you have questions to ask or expertise of your own to share?

Society for Nonprofits is actively engaged on LinkedIn, Facebook and Twitter. Find us on your favorite social media platform by visiting **social.snpo.org**

If you have any questions, contact Jason Chmura at jchmura@NonprofitWorld.org