

Orienting New Nonprofit Board Members – Don't Make it Sink or Swim

By Amy Wishnick



Does your nonprofit bring on new board members annually as a class, rather than randomly throughout the year? If they start out together, I commend you for choosing this wise approach. If not, I hope you will consider making a change after reading this.

When we think about it, nonprofit board members have a significant responsibility. Through their leadership, they hold the organization in trust for future generations. Exactly what this means for any organization depends on its life cycle stage and all the factors in play at any given time.

Orienting board members is crucial because the stakes are high. No one can lead in a vacuum. Without any context, without any understanding of how a particular board of directors operates, new directors may feel lost. Without connection and familiarity, new board members cannot champion, fundraise for, or advocate on behalf of their organization.

Jumping in Midstream: Provide a Life Jacket

Joining a board is like jumping into the middle of a river. Decisions and actions have been made since the beginning of the organization. Priority issues change over time. It is a necessity to clue in new board members to the issues that the organization is facing – those issues that new board members will be voting on even though they haven't been tracking the discussion since the issue surfaced.

There are several existing tools within an organization that provide a life jacket to support new board members in their efforts to keep up with the board's business. If you don't already, at a minimum, provide new directors with these items – and ask that they review them before their first meeting:

- Your organization's website
- All of the past year's board meeting minutes
- Strategic plan
- Fundraising case for support
- Master calendar
- Board contact list
- Current annual budget and prior year's budget/actuals
- Current financial statements

What New Directors Need to Know: The "Easy" Stuff

When orienting a new class of directors, beginning with the mission, the history, the core values, and vision is fundamental – it's the expected information, the usual fare, the easy stuff. Without

a connection to and understanding of these aspects of an organization, board members are lost before they begin. Covering the organization's work, staff, community partners, fundraising, and so on is generally straightforward. The more nuanced and less transparent information may be about how the board itself functions.

While not at all exhaustive, here are other essentials to share with new board members:

- What is the organization's budget?
- What is the budgeting process?
- What is the scope and level of fundraising?
- What are the fundraising revenue streams?
- How do budget and fundraising and program intersect?
- What programs and services do the organization offer?
- How do you communicate and share information about what is going on with programs and other aspects of the organization?
- Is there a strategic plan? How is it monitored?
- What are the board's committee structure and the expectations for board members?
- How often does the board meet? When? Where?
- What is the meeting schedule?
- Does the board have an annual retreat?
- Who are the other members of the board? What do they do, their affiliations? What do they bring to the table?

The answers to these questions surely present themselves over time and during board deliberations. But it can be risky to wait for the answers to emerge.

I once served on an advisory board, and the organization used so many acronyms it was overwhelming. In my first meeting, I gathered my courage and asked what one of the acronyms meant. (After all, if I hadn't asked at the start, it would be too odd to ask months in when I would have effectively been admitting that I didn't know what everyone had been talking about.) There was an audible collective exhale when I asked the question. Obviously, I wasn't the only one wondering!

Board Culture: Cut the Learning Curve

Fitting in and understanding how the board operates increases a board member's ability to successfully navigate and contribute as a trustee. Without an orientation, it may take many meetings before new directors catch up with what's going on. Reduce the learning curve so that valuable opportunities are not lost.

How does your board conduct its business? This list is only a beginning of the kinds of questions that probe board culture:

- What is the tone of your meetings?
- Do you strictly abide by Robert's Rules of Order?
- Do you watch the time carefully or let people talk as long as they need or want to?

- Do directors arrive early to chat with each other?
- Do you always conclude with an executive session?
- What are other norms for this particular board?

Of course, new directors will eventually pick up on the answers to these questions. But an organization runs the risk of losing its attention or input (and maybe even goodwill) if it is too difficult to find a way in.

All this attention to orienting new board members facilitates seamless leadership and good governance. Don't skimp. Don't think new directors will acclimate by osmosis. Most organizations don't have the luxury of taking the time to do it this way. Moreover, board members' interest is likely to wane, or they will become frustrated before they become knowledgeable. Focus on enabling them to start out on the right foot by sharing more rather than less.

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