



## BOARD ORIENTATION / ONBOARDING

Board Orientation prepares the new board member to serve effectively on your Board of Directors. Board Orientation is

*"An intentional time set aside for orientation is a way to start embedding concepts into heads (by detailing program data), engaging hearts (connecting board member with passion and mission), and putting tools in hands (reference materials, by-laws, operating procedures). That's orientation. The hard work of building relationships, creating meaningful impact and engaging a high performing board is the ongoing work of board development."*  
Mark Fulop; <http://facilitationprocess.com/facilitating-a-nonprofit-board-orientation/>

Typically the board chair and chief executive facilitate an orientation session. Orientation will involve providing the new member with a Board Manual, hard copy and/or digital. Use the Table of Contents for the board manual to go through all topics with your new board member. Topics will vary depending on the organization. Standard topics include:

- Vision, Mission and Values of Organization
- History of Organization
- Board Roles and Responsibilities
- Executive Director / CEO Role and Responsibilities (include job description)
- Communication Guidelines
- Board Positions (executive committee) and board member contact information. Include job descriptions.
- Calendar of Board meetings and other dates important to the organization
- Organizational Chart, including standing, ad hoc and member committees
- Articles of Incorporation and By-Laws
- Current budget and financial statement
- Current Strategic Plan
- Summary of programs / services

Other topics:

- Policies (or a policy manual is developed separately), including Conflict of Interest, Whistle Blower Policy, Document Retention & Personnel Policies as a minimum.
- Some Board Manuals contain a summary of prior board motions as part of succession planning. This is suggested as a means of allowing current board members to know if the board has acted previously on important issues. Access to prior board minutes should be provided, by link or other means.

In reviewing the Board Manual with the recruit, board roles and responsibilities should be given the utmost of attention so that the new member knows what is expected. Of particular importance is resource development. Some board members are hesitant to speak to a new member about fundraising responsibility. A fundraising document can be provided to the new member outlining the many ways board members can get or give funds to eliminate the discomfort of this topic. Many boards have a threshold amount that board members are expected to raise and further require a pledge form to be signed each year.

Beyond providing a Board Manual to the recruit, orientation models vary. The concept of **onboarding** might be more accurately defined as described by Mark Fulop as that part of orientation related to engaging hearts. Onboarding includes building knowledge and skills but should also serve to fully motivate the new board member to enthusiastically embrace the mission and feel an important part of the team.

Some models make use of a buddy system; board members volunteer to be the new member's buddy for the first several months or so. The buddy takes the new member under their wing to answer questions, provide a deeper review of organizational documents and history as well as introduce the new member to programs and staff. Some organizations include tours of facilities or field trips to see the mission in action to more fully engage the new member. If there are volunteer activities, for instance, the new member might be encouraged to volunteer with their board buddy in a program activity to more fully involve the new member in the service provided by the organization.

Onboarding might also include involving the new board member in a committee or allowing the new member to meet with various committees to determine the best fit.

Initial orientation needs to occur before the new member's first board meeting. A personal phone call from the Board President to welcome the new member is also suggested prior to the new member's first board meeting. At the new member's first board meeting, time needs to be devoted to the full board's engagement in the orientation process. This meeting should involve introductions (name tags are helpful), length of time served, positions, expertise, and the rewards and benefits of serving. This first meeting should be considered a team building exercise. An appropriate activity can be designed to facilitate this process.

Some boards include presentations by one or more board members about specific programs or activities of the organization. The strategic plan is a valuable source for presentations and can serve to further motivate the new recruit.

Another model involves the entire board in orientation by reviewing the Board Manual at the new member's first board meeting. This can provide a refresher course for older members, provide training that might not have occurred previously or update members on specific activities or policies that are not always discussed at board meetings.

It is helpful to have a board committee whose purpose is Board Development. This includes procedures related to recruitment, nomination, orientation, training, evaluation and succession planning. This committee should also concern itself with ongoing support for board members.