

Board Orientation

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Identifying a new board member is only the first step in what you hope will be a mutually rewarding relationship. Whether orientation of your new board member is approached informally, or formally, be sure to include the basics needed for new board members to become engaged in the work of the board right away, and to serve as a committed ambassador and advocate for your nonprofit's mission for a long time to come.

Onboard with vigor

Start the relationship off right by introducing new board members to the [basic roles and responsibilities](#) of service as a nonprofit board member, and also provide specific information about your nonprofit's mission and activities.

Here is a sample outline of what might be covered in the orientation:

- Your nonprofit's mission and history, and its statement of values
- Bios of current board members and key staff
- [Board member job description](#) and expectations
- [Board member agreement](#)
- [Conflict of interest policy and questionnaire](#)
- Recent financial reports and audited financials
- Bylaws and certificate of incorporation
- Determination letter from the IRS and certificate of tax exemption from the state

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- Policies (or board resolutions) relating to the [board's role to review the CEO/executive director's compensation](#)
- Board [travel reimbursement policy](#) and form to use to request reimbursement
- [Whistleblower policy](#)
- Annual report or other document that lists the donors/grantmakers that support the nonprofit
- Board roster and list of committees, their charters, and who serves on them
- Calendar of meetings for the year ahead

PRACTICE POINTERS

- Help manage expectations of new board members by sharing a "[position description](#)" with them, tailored for your nonprofit. DO include any expectations about personal giving/fundraising efforts.
- Have you considered asking a veteran board member to serve as a board buddy or mentor for a new board member?
- Name tags and/or tent cards on the table at meetings are helpful so that new board members can get to know their colleagues and connect names with faces.
- Some people join boards to share their professional expertise with the nonprofit. Others want to do something completely different from their normal professional life when they volunteer, so make sure to ask your new board member what s/he is most interested in before assigning new board members to committees.
- A follow-up phone call from the board chair after the board member agrees to serve, but before his or her first meeting, can set the stage for a positive communications and a productive relationship with the board chair.
- The orientation meeting itself can include a field trip to see the nonprofit's mission in action via a tour of the nonprofit's facilities - consider sharing a video if an in-person visit isn't practical.
- Don't forget to include in the orientation background on any special issue(s) that pertain specifically to your nonprofit's mission, plus information on: [governance policies](#) (so that all board members are reminded about their legal and fiduciary duties); [accountability practices](#) (such as the need to disclose conflicts of interest); and the responsibility to review and approve the [executive director's performance and compensation](#), among other key policies. (A sample orientation checklist is linked below in the Resources section.)
- Inviting fellow-board members, such as officers or committee chairs, to lead relevant portions of the orientation offers another way for newbies to get to know their colleagues on the board as well as the

- Inviting all veteran board members to attend each board orientation gives those board members who missed their own orientation – or would like a refresher – to get caught up, and also reinforces a culture of continuous learning.
- Keep it short – maybe approach the orientation in “bites” instead of one huge gulp – so that new board members are not overwhelmed with all the information.
- Make sure every board member knows who s/he can ask with questions, and that there is no such thing as a “dumb” question! Encourage a culture of inquiry and candor.

BEYOND ORIENTATION

Society expects so much from our volunteer board members – in turn we need to thoughtfully prepare and support them. Rarely do new members arrive on the board with years of experience in the nonprofit sector. Most often they will have only a passing familiarity with what a nonprofit is all about, but lots of passion for the mission of your organization. Consequently, finding ways to "educate" your board members on a regular basis about their important role, as well as about issues that impact the environment in which the nonprofit operates, are high priority activities that promote ongoing [board engagement](#).

- Introduce important topics for the board to wrestle with using our [Tip Sheet for Candid Conversations](#).
- Make sure meetings are well-planned and guided by the nonprofit's strategic directions. Here are some tips for [effective meetings](#) (National Council of Nonprofits)

Resources

- [Board Basics handbook](#) (for sale from the Maine Association of Nonprofits)
- [A template for a great board orientation](#) (Joan Garry)
- [Board orientation checklist](#) (BoardSource)
- [Sample board orientation checklist](#) (Chorus America)
- Should board members have a “[contract](#)”? (Blue Avocado)
- [Board members and personal contributions](#) (Bridgespan/BoardSource)
- Goodies for board orientations: [Glossary of financial terms](#) (Nonprofit Finance Fund) [cheat sheet on balance sheets](#), [characteristics of financially healthy nonprofits](#), how to [manage restricted funds](#). (Propel Nonprofits)

It's our hope that board members recognize that advocacy is part of their role to serve as ambassadors in the community. Help them [Stand for Your Mission](#).

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