

Board Orientation



Few board members can claim to have been born with the natural aptitudes needed for nonprofit board service.

Some have gained governance knowledge by educating themselves and serving on other boards, where they have successfully applied their specific expertise to their governance duties. But no potential board member can confidentially declare ahead of time that they will be an exceptional member for a particular board before having an opportunity to interact with their board member peers and see the full board in action.

Every board has a culture that is defined by its customs, traditions, and practices. Every new board member needs an introduction to that culture — not just the ability to meet the general expectations placed on individual board members.

Why board orientation?

Every board member candidate has a right — and should demand the right — to learn what they are getting into ahead of time. Orientation can be many things for the board member: an initiation to board service; an introduction to the organization, its mission, and programs; clarification of future time and financial demands; an opportunity to get to know other board members; and a chance to form an educated foundation for the coming years of service on the board. For the board, orientation is a chance to speed up the learning curve of new members and get them quickly engaged in the board's activities. It ensures that every member is functioning within the same framework and with same instructions. Orientation benefits the board as a team by providing an official launch for new partnerships and relationships.

Appropriate settings

Some boards organize a full retreat — lasting several hours to more than an entire day — to cover all aspects of orientation. This approach may be too demanding for some boards whose members are spread nationwide and who already commit themselves to attending regular board meetings. Additionally, for any board, it may be information overload in a too-short time span.

Dissecting the curriculum and goals of the orientation beforehand can properly facilitate the delivery of information, use everyone's time effectively, and share the duties more evenly. As a result of cultivation, for instance, a candidate should already have a firm understanding of the organizational mission and how they can help advance that objective. New board members should be expected to read the board handbook during their own private time, not in the meeting room. The core orientation meeting, then, can become a setting where old and new members get to know each other, key issues are covered in detail, and question-and-answer sessions clarify additional areas of concern or importance. The first board meeting will officially indoctrinate any newcomers to regular business.

Participants

Naturally, the primary recipient of orientation education is the new board member. All new members should participate. Every current board member has a role in orientation as well, whether to function as a mentor, represent the diversity of the team to the newcomer, make a presentation, or just get to know the new member(s). If the board organizes separate sessions for different aspects of orientation, it may not be necessary for every single board member to attend every session. No matter how engaging the program, going over the same history and documents on a regular basis can become an unwise use of current members' time.

The chief executive plays a key role in the success of the orientation. The chief executive is the person most knowledgeable about the organization and thus the perfect person to share this information with new board members. The chief executive usually guides the staff to organize the logistics of the meetings.

The board may decide to engage a facilitator to conduct the sessions — so that all participants may contribute freely without other obligations and to bring in an unbiased and professional approach to presenting information. Outside guest experts may be invited to contribute additional perspectives to specific discussions.

Effective tools

To turn orientations into effective training sessions, follow these guidelines:

- **Bring the right people together.** Expect everybody to attend assigned sessions. Help everyone get to know each other.
- **Create a conducive atmosphere.** Bring informality to your “classroom.”
- **Choose different modes to get your message across and to address certain issues** (facilitated discussions, small group exercises, case studies, etc.).
- **Manage expectations.** Be clear as to why everyone is in the room and what they are supposed to get out of it.

- **Choose the right focus.** Concentrate less on the organizational details and more on how to be a good board member.
- **Discuss team work.** Boards are teams, and only as a body can the board make decisions.
- **Incorporate the social side** of board work already in the orientation process. Board members are often busy professionals and want to find an enjoyable professional setting for the retreat. Collegiality facilitates effective communication.
- **Give homework.** Orientation is just a beginning; show board members how they can build on what they just learned.

101 Resource | Last updated: August 5, 2022

Resources: The Board Building Cycle: Nine Steps to Finding, Recruiting, and Engaging Nonprofit Board Members; Getting On Board with Effective Orientation: A BoardSource Toolkit