

A Template For A Great Board Orientation



Does your nonprofit already have an inspiring, helpful, put-together board orientation program for new board members? If yes, you get a big hug from me. Well done.

This post isn't for you. Instead, consider reading [Critical Interview Questions for New Board Members](#) (a very popular post I wrote that helps you figure out what to ask people you are considering for your board.)

For the 95% of you that are still here... well, we have some important work to do.

Healthy nonprofits have great boards that work hand-in-hand with the Executive Director to help fulfill the mission.

In order to have a great board, a nonprofit needs board members who are engaged, inspired, and understand how to help. This is true for long-standing board members. This is *especially* true for brand new ones.

So why don't you have a great board orientation program? The main objection I hear is time. You wish you had a moment to pee, no less pull together a board orientation package.

Today I'm going to show you *exactly* how to create such a package, step-by-step. By the end of this, you will have no excuse. You will see very clearly why this is so important. And you'll be fired up to do it.

My board orientation template works for tiny one-person nonprofits just as well as it does for large ones. In fact, for smaller nonprofits, it's especially easy to put together.

So here we go...

NEW BOARD MEMBER ORIENTATION FAIL

First, let me tell you the true story of "Sylvia" and her recent experience when she joined a board.

Sylvia had been involved as a donor to the organization. She enthusiastically agreed to join the board because she believed she could make a difference.

During the recruitment process, she received some basic materials about the "job," most specifically a document outlining roles and responsibilities. Score one for this organization.

Time for her first board meeting.

Even though there was a class of new board members joining at the same time, there had been no separate gathering to provide any information to enable them to hit the ground running.

Nevertheless, Sylvia walked into the meeting feeling excited. She was pointed to a table of binders, each with a name on it. "My board orientation pack," she thinks. But there was no binder for her.

"Oh, just take Bob's – he's not coming tonight." Bob has been on the board for years.

The binder contained a wealth of current and past information, including many pages of past board meeting minutes. But there was no time to review it before the board meeting started.

Sylvia was lost – it's like she started reading a book in the fourteenth chapter.

She discovered that decisions were often made by mysterious committees. There was an executive committee. It seemed to have a lot of power. She wasn't too sure who was on it.

The committees weren't the only mystery. The most baffling one came at the end of the evening when all binders were to be returned to the table. You couldn't take them home. The only explanation was that board members would not return them and they'd have to make new copies.

How long do you think Sylvia lasted on the board? Let me just say that she didn't make it past her first term.

This story makes me mad. Sylvia was more engaged before joining the board than after leaving. Nonprofits can ill afford to lose one single person who raises her hand or opens her checkbook.

A new board member needs so much more than this. The job is fuzzy to begin with. And oh, let's not forget that they already have a job.

So I don't care what size your organization is, you need to do SOMETHING. You need the board member to have context, information and color commentary so she doesn't have to try pick it up by osmosis.

JOAN'S SIMPLE AND EFFECTIVE BOARD ORIENTATION PLAN

Now we get to the meat... the plan itself. My plan has two parts – 1) The Binder and 2) The Session.

The point of each is to make sure new board members feel the following:

- Well informed about their role
- Generally well informed about how the organization operates
- Who's who
- Proud and able to share a few key accomplishments of the organization as they begin to tell friends, family and colleagues about their new gig
- Ready to contribute on day one
- Impressed that they have joined a professional organization
- Valued and appreciated

Board members who walk through the doors feeling this way are your most engaged and productive board members. They are your future leaders.

I'll explain each part of the plan in turn.

THE BOARD ORIENTATION BINDER

The Binder is specifically for brand new board members and it is for them to *take home* to read, review, take notes, and write questions in the margins. The Binder should be sent out to the new board member ahead of The Session so it can be reviewed and marked up with questions and comments.

At the bare minimum, the contents of this binder should include the following.

- History One Pager: Outlines the history of the organization. You can get someone to cut and paste from the website. It would be nice if this language was inspirational and reminds the new board member why they want to be an ambassador for the organization.
- Staff Organizational Chart: If you're a one-person staff, this will be awfully easy to put together.
- Program Highlights for the Year To Date: A brief document that gets new board members excited about accomplishments and new initiatives underway.
- Board Roles and Responsibilities: If you don't have these, that's a flag on the field. There are dozens of good resources online for templates. [Here's one I like](#). Please have a board discussion to customize it. Share it during the interview and put it in The Binder.
- List of All Current Board Members: In an ideal world, the document should tell a new board member what each fellow board member does for a living. An intern (if you have one) could reach out to board members for a brief bio and photo. This would be especially generous to include.
- List of Board Committees, Charge, and Members of Each: I am painfully aware that boards frequently fail to develop real charges for their committees – *why do they exist? How do they move the work of the organization forward?* That's a sad reality. If no charges, just show a list of committees and who sits on each.
- List of Upcoming Meetings: Anything you can do to promote attendance with lots of notice, the less complaining you will do.
- Mark Your Calendars!: This is a list of upcoming events, either programmatic or development related, to give the new folks ample notice to add to the calendar.
- Any Strategic Planning Document: Overall and top line only. Usually there is an executive summary or a vision document.
- Approved Budget for the Calendar Year:
- Most Recently Monthly Financials: To help a new board member understand the organization's actual revenue and expense vs. budget.
- Most Recent Audited Financial Statement: Here a new board member has a sense of the financial stability of the organization through the eyes of an expert objective third party.
- A Copy of the Organization's By-Laws
- Fundraising One Pager – here you want to emphasize that there IS a fundraising obligation, a board approved give/get (if you have one) and a list of some of the many ways the obligation can be met. Here your goal is two fold – to make it clear

that they have an obligation and to give new members comfort about how that goal can be met with staff support and ideas.

- Board Meeting Minutes – I would suggest at least 3 meetings back. More may be overkill.
- Agenda for the First Board Meeting – often these orientations precede board meetings so including the agenda can make sense.

Don't think you have time to put this together? I don't buy it. Many of these items can be done in minutes by you or even by an intern.

THE BOARD ORIENTATION SESSION

Who Should Attend

Chair of the Board, Executive Director, Chair of the Recruitment Committee, Lead Program Person and Lead Development person.

Who Should Run The Meeting

The Chair of the Recruitment Committee. The successful recruitment and *retention* of board members rests here.

Agenda (allocate 90 minutes and be happy if it is shorter)

- Get to know one another. What you do, why this organization is important to you and what you think you bring to the organization. Make sure everyone does this, not just the new board members.
- Do you have any kind of organizational video from a recent gala? Remember, you need to get new board members excited and inspired. That's what these videos do. No video? Ask the Program person to share a few stories that affirm the new board members' decision to join. Bring the work to life! If you can ask a client to join and speak, that would be a home run.
- E.D. shares the vision for the organization and the place the new board members have in that vision – why they were recruited and what value they bring (honor and appreciate them).
- Board Chair – reviews roles and responsibilities. Fields questions.
- Fundraising Staffer (if you have one) – reviews the one sheet in the binder and fields questions. Again support and enthusiasm for the obligation and an assurance that the staff will offer guidance and support.
- Board Chair outlines the upcoming board meeting agenda so new members have a preview of significant items to be discussed.

I promise you this is not hard. If you think otherwise, you're over-thinking it. I've suggested documents that are two pages max and easy to pull together.

Like I said, with some direction, an intern can pull all of this information together with ease.

The E.D. and Board chair can agree as soon as board members are selected on a time and place for The Session and lock it in. Then The Binder can go out immediately, giving the board member the 'homework assignment' to read it before the board orientation session.

Did I capture everything? Any suggestions about how to pull all this together as efficiently as possible? How have you managed resistance from the board chair or staff leader about the value of this upfront work?

I hope I've helped you think through a good board orientation process in a manageable way. And affirmed its value to the health of the organization.

Anxious to hear what you think.

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