

## Best Practices for Board Orientation

The board of directors plays a vital role in establishing and maintaining the organizational structure of a non-profit. This elected group oversees the organization's activities and meets periodically to discuss and vote on business affairs.

Given the critical role board members play in an organization's overall success, these individuals need to be up to speed on the organization's mission and goals. That's where board orientation comes into play.

Board orientation is when new board members are provided with detailed information on the organization and their role within it. Whether the process is approached formally or informally, an engaging board orientation can encourage new board members to become committed ambassadors and advocates of the non-profit's mission.

This article discusses some best practices surrounding board orientation and what to cover during the process.

### Importance of Board Orientation

Effective board orientations acquaint newly elected board members with their role, the organization and the team. A thorough, engaging onboarding process can make new board members passionate about achieving the strategic mission and vision of the non-profit.

To ensure critical topics are covered, begin the orientation process by issuing a binder to new board members. This binder should be provided before their first meeting so they have the opportunity to review and make notes for questions. Topics should include:

- **The non-profit's history** — Include inspirational language when recapping the non-profit's history to continue inspiring and reminding the new board members why they want to be involved with the organization.
- **Year-to-date highlights of the board** — A summary of past accomplishments, as well as new initiatives, can get the new board members excited about the non-profit's mission and goals.
- **Board roles and responsibilities** — Ensure that new board members understand how each position works together to achieve organizational goals by providing information on each role.
- **Current board members** — Providing a list of current board members can help new members get acquainted with their new colleagues.
- **List of all committees and their members** — To further educate new board members on the structure of the non-profit, include a list of committees (if applicable), detailing who sits on each.
- **List of upcoming meetings with a schedule** — Giving board members advance notice of all sessions can help boost attendance.
- **Strategic planning document** — An executive summary or vision document can give board members an overview of the non-profit's direction.

- **Approved budget for the year** — Inform the new board members of the approved budget so they have a realistic idea of what can be accomplished within their role and by the board.
- **Audit financial statement** — Give the new board members a sense of the organization's financial stability from an expert objective third party.
- **Recent financials** — This information can provide an understanding of the organization's actual revenue and expenses.
- **Bylaws** — Non-profit bylaws provide the rules and procedures included in running the organization. If new board members don't fully understand the non-profit's bylaws, they could potentially open up the organization to considerable directors and officers liabilities.
- **Board meeting minutes** — The past three meetings' minutes should be sufficient in helping the new board members catch up on recent and current happenings.
- **Agendas for the first board meeting they'll attend** — Board orientation usually occurs before the new members' first board meeting, so including the agenda can help them prepare.

The chair of the board, executive director, chair of the recruitment committee, lead program person and lead development person should all be present during board orientation to welcome, inspire and educate the new board members. Typically, the meeting will be run by the recruitment chair since they brought the new members on board. They should work to retain them by building upon their established relationship. The chair of recruitment can create a presentation for board orientation that thoroughly examines:

- The mission, purpose and framework of operations
- What the board does
- Organizational structure
- How voting works
- Current projects and vision for the future
- Strategic direction
- Financial overview of the organization
- Expectations
- Meeting schedule

Board orientation should provide important information about the organization to new board members and begin to build working relationships among board members to promote a supportive environment. A thorough orientation can also reduce the likelihood of liabilities arising since new members will have a better understanding of the policies and procedures of the non-profit and the board of directors.

*If you have questions specific to your business or organization, or would like additional information, please reach out to your Lloyd Sadd Advisor.*

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