



Orientation and Training of New Board Members

Having an effective Board is a significant key to a operating a successful nonprofit organization. Effective Boards of nonprofits will typically operate as strategic partners to the CEO and other top members of management and be actively involved in all major decisions of the organization. In order to maintain an effective Board, nonprofits should develop an orientation and training program for all new board members.

The program begins with orientation. Typically, nonprofits focus on learning about the potential candidates to fill open positions rather than first providing the candidate information about the organization. Instead, the information is typically provided after the candidate is on the Board. Information that should be provided to candidates during the orientation process includes:

1. Detailed information about the organization, including the mission and strategic plan, programs and services, and financial data such as the most recent audited financial statements.
2. The workings of the Board, including a list of current board members and committees.
3. Expectations for individual board members, including the number of meetings, length of board term and an estimate of the time requirement.

By providing this information before a candidate is even voted upon, the candidate is provided a better understanding of what will be asked of him/her and will be able to assess their level of interest.

The organization should also provide candidates with a tour of the organization's office, and introductions should be made to staff members, clients and volunteers. This allows the candidate to gain a better understanding of the day to day operations of the organization.

Once a candidate is elected and becomes a board member, they should be provided with a detailed board member manual. This manual should include items such as:

1. Bylaws;
2. Articles of incorporation;
3. The current budget;
4. A recent Form 990 as filed with the IRS;
5. Most recent audited financial statements; and
6. Copies of minutes from the previous year.

Nonprofits should also consider assigning a mentor board member to help guide the new board member for the first few months. By providing both a mentor and manual, the new board member should have all the resources needed to become an effective board member.

The process of developing an effective board starts with orientation and continues into the training process. If your organization would like assistance with developing an orientation and training plan for board members, please contact Bob Stillman, Jennifer Osburn or Marc Otte at 614.221.1120.