

Welcoming New Board Members in a Not-for-Profit Organisation

The board of directors plays a vital role in establishing and maintaining the organisational structure of a not-for-profit (also known as non-governmental organisations or NGOs). This elected group oversees the organisation's activities and meets periodically to discuss and vote on business affairs.

Given the critical role board members play in an organisation's overall success, these individuals need to be up-to-speed on the organisation'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 organisation 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 not-for-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 organisation and the team. A thorough, engaging onboarding process can make new board members passionate about achieving the strategic mission and vision of the not-for-profit.

To ensure critical topics are covered, begin the orientation process by issuing an information folder to new board members. This folder should be provided before their first meeting so they have the opportunity

to review and make notes for questions. Topics should include:

- **The not-for-profit's history**—Include inspirational language when recapping the not-for-profit's history to continue inspiring and reminding the new board members why they want to be involved with the organisation.
- **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 not-for-profit's mission and goals.
- **Board roles and responsibilities**—Ensure that new board members understand how each position works together to achieve organisational 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 not-for-profit, include a list of committees (if applicable), detailing who sits on each.
- **List of scheduled meetings**—Giving board members advance notice of all sessions can help boost attendance.
- **Strategic planning document**—An executive summary or vision document can give board

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members an overview of the not-for-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 organisation's financial stability from an expert objective third party.
- **Recent financials**—This information can provide an understanding of the organisation's actual revenue and expenses.
- **Bylaws**—Not-for-profit bylaws provide the rules and procedures included in running the organisation. If new board members don't fully understand the not-for-profit's bylaws, they could potentially open up the organisation 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 programme person and lead development person should all be present during board orientation to welcome, inspire and educate the new board members. Typically, the recruitment chair will run the meeting since they brought the new members on board, and 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

- Organisational structure
- How voting works
- Current projects and vision for the future
- Strategic direction
- Financial overview of the organisation
- Expectations
- Meeting schedule

In Conclusion

Board orientation should provide important information about the organisation 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 not-for-profit and the board of directors. For more risk management guidance, contact us today.