
The Three Mistakes Nonprofit Leaders Make Orienting Board Members

We know that boards influence the performance of your nonprofit. So, having an effective board is very important to your mission — and that’s what you care about, right?

One of the biggest opportunities you have to ensure your board realizes its full potential and advances your organization’s mission is in orienting new board members effectively. Yet, while so many nonprofits do orient new board members, most nonprofits make three big mistakes in their board orientations causing them to lose valuable time and resources.

I’m going to share those three mistakes with you here and give you practical action steps you can use right away to prevent them. You’ll see how, when done right, your board orientation does a lot more than just inform board members. It inspires, engages, and empowers your board members to do the job you need them to do. And what that means for you is:

- If you are the executive director, they will let you do your job without micromanaging you.
- You will have strategic partners to advance the mission.
- You will have excited ambassadors who engage others and attract resources.
- You will be more effective in your own role and your time with or on the board will be efficient and effective.

I have seen what an asset an effective board can be, and I’ve seen a lot of boards grow to have a very positive impact. But, there is a lot of untapped potential in nonprofit boardrooms.

People are on your board because they care about the mission but not everyone knows how to bring their gifts, skills, and connections in the best way to make as big a difference as they could. In this article, you’ll learn some strategies to help your board members do that from the very first day they join your organization.

If you have a board orientation program in place now, the insights I share here will help you make it even better. And if you don’t have one yet, you’re going to get some information that will help you get off to a great start.

We had a board member orientation process when I was an executive, but it was missing some essential elements to make it as powerful as it could be. Trust me when I say that I’ve

personally experienced all the mistakes that I'm going to talk about and I've seen what's at stake when they happen. I don't want you to experience that. I want to support you in having the great board your nonprofit deserves.

The First Mistake

The first mistake that nonprofit leaders make orienting board members is that their board orientation is incomplete.

I mentioned that when I was an executive director we had a board orientation process, but it was lacking in some key areas. One of the biggest ways it was incomplete is that while it did a great job educating board members about our nonprofit - its history, mission, finances, programs - it didn't include how to be a great board member. And that's a huge lost opportunity .

Most board orientation programs are incomplete in two important ways. First, they don't provide enough information about what your new board members need to know about the job of being a board member, including the full scope of governing roles and responsibilities.

I imagine you have a board manual. That's an important tool to have, but a few pages in a manual about board member roles or a board member job description are not enough. And, what is included often focuses on what board members *have to do* - not all the opportunities for what they *can* be doing to advance your mission.

I'm sure you have heard about board members who get on the board and then hold back — they are waiting to figure things out and want to observe for a while before they speak up. I remember a conversation I had with a board member at a fundraising event. He was on the board of a local museum and had been for almost one year. He shared that he had never served on a nonprofit board before and was learning how the board functioned. He didn't feel comfortable yet in his role. He confessed that he rarely spoke up at the meetings even though he was usually a vocal financial services executive. I felt sad thinking of all the ways that he could have added value that were lost during those months. He didn't fully understand what it means to be a board member. The result was a true waste of his time and a real loss for the museum of any resources or benefits he might have been able to bring.

While you may not experience this extreme of an example, unless your board orientation program *fully* informs board members about what governing does but also *can* include, your

new board members are not going to hit the ground running — is a colossal waste of valuable resources.

The second way board orientations are incomplete is they don't show how the board "fits" into the organization — especially relative to you if you're the executive director — as well as staff and volunteers. As a result, there's a lot of stepping on toes that happens.

Have you ever had board members get too involved in the day-to-day operations? Their intentions are good, they're trying to help. But you know this can lead to problems.

So, it's important to make sure your board orientation program is complete. And it's especially important for you if you're the executive director because the reality is that, for most nonprofit executives, the job of filling in the information gaps ends up falling to them. Without a complete board orientation program that new board members can refer to and access on their own, you have to repeat things that didn't sink in the first time. This is inefficient, and executive directors can't afford that.

What Can You Do to Avoid This Mistake?

Here are some tips to help you have a *complete* board orientation including a strong governance component:

- Information about governing roles can be dry and impersonal. You want to broaden the scope of the information in your orientation program beyond the basics to include the *opportunities* board members have, to have fun and do interesting things — like building relationships with stakeholders, framing your messaging, advocating and being an ambassador of the mission, team building for the board, and creating a strong partnership with you if you're the executive directors.
- Start with why. Board members need to know why the job of being a board member is important. Include in your board orientation information about how effective boards have positive impact. Share some specific examples of how your nonprofit has benefited from results your board has created.
- Include information that helps board members know how the board fits within your organizational structure. Make sure they understand governance never includes day-to-day management of the operations. Make sure they clearly understand their roles and responsibilities *as distinct from the executive's and that of other staff*.

When this is clear, they'll see where they can make a difference as a board member and not try to do staff's work.

The Second Mistake

The second mistake I see in board orientation programs is they don't inspire and engage board members.

Let's face it. A lot of the information needed to educate board members about their roles is hardly inspiring. New board members typically know you have to have a board and that it helps with oversight, sometimes fundraising, etc. But most board members I meet are totally unaware of how effective board members, and boards as a whole, positively impact the nonprofits they serve. And that's partly because most board orientations don't help board members understand why *they* matter or, for that matter, why the *board* matters to the mission.

It's also usually a "one size fits all" approach — as if all board members were the same and supposed to all do the same things. The orientation isn't inspiring and doesn't engage each individual board member with the information in a personal way.

Board members have different skills, talents, and interests they bring to the table. They come to your nonprofit hungry to make a meaningful contribution, and the best way they can do that is by creatively leveraging their uniqueness.

Unfortunately, most board member orientations don't include specific activities or tools to help board members identify their interests, skills, and talents that are relevant to board service or match those talents and interests with their board member role in creative ways.

Board orientation programs are just not personalized for individual board members. Because of that they don't inspire or engage them.

Costs of the Second Mistake

Because of this mistake, board members are not fully contributing what you brought them on the board to contribute. Their gifts are underutilized (a resource you are losing) and they are not maximizing the time they are spending to add value. This is a real loss for the board member and for your nonprofit.

With this mistake, board members don't connect the dots between their understanding of the job of a board member and the unique ways they can engage and contribute.

When they can't find other meaningful but appropriate board work, we know board members may delve into operations and the details. When they make the connection between their interests and talents and a board member's roles and opportunities, they will look to contribute *there* - and not in work that is the executive's.

How Can You Avoid This Mistake?

Inspiration, not just information, is what motivates people and gets them engaged. Your board orientation process needs to engage board members with the information in a personal way. It should help them get in touch with what is personal about their connection to your mission. Build in time to have them think about that specifically — what is their personal story?

Arouse their energy and caring for your mission, so it isn't that they just *know* the connection intellectually - they *feel* it emotionally. Then, at every step, help them tie the job of being a board member to the heartfelt reason they signed up — your mission — and how their role expresses and touches it.

With that self-awareness top of mind, give them time in the orientation process to consider what the roles and opportunities of being a board member mean for *them*.

Have them identify their unique talents, gifts, connections, etc. that they are willing to bring to your nonprofit via their board service. How does who they are fit with what you and your board need and want? It helps, too, if board members know your nonprofit's strategic goals and how their job (again as compared to staff's) connects with them.

Have them think about their unique ability to contribute and to look at governing through the lens of their strengths, skills, and interests. Make it personal, so they can be inspired and see how they can add value right away.

When designed well, a board orientation program inspires each board member to fulfill the unique contributions they're there to make and that most benefit your nonprofit.

The Third Mistake

The third big mistake nonprofit leaders make in orienting new board members is inconsistent

delivery. What do I mean by that?

It is my experience, and that of executive directors I hear from, that there is typically no board orientation *system* in place that is consistent for each board member and new board members over time. Without a system:

- It is often unclear who is responsible for the process — is it the board, or is it the executive director?
- The amount of time available to do the orientation on the part of the executive director or board members varies from new board member to new board member.
- The key messages an executive director wants board members to “get” (such as staying away from day-to-day operations) are not consistently included. And who is delivering these messages? The executive director? The board chair? An outside expert?

Another inconsistency is how board manuals are used. Do you have them? Are they up to date? Manuals typically include important information about your nonprofit but just a page or two about what it means to be a board member — again, an uninspiring approach.

Do any of these resonate with you?

Costs of the Third Mistake

What are the costs of having inconsistent delivery - lacking a system for board orientation? Think about it:

- When the part of your board orientation that deals with governing is inconsistent, board members may not be confident that they “got it all” and may still hold back as new members - thus limiting the full potential of the board and their individual engagement.
- If the board doesn’t lead the process it falls to the ED, and it can be awkward then to deliver messages about roles and boundaries that the ED would like board members to hear/know.
- Inconsistency costs you time and resources — as things are reinvented or rescheduled, etc.

How Can You Avoid This Mistake?

My big tip for you to deal with this mistake is: Use a system!

Here are my recommendations:

- Have a consistent orientation program – a system – that includes both information about your nonprofit (mission, history, services, finances) *and* the governing information I have been talking about.
- Be sure it is comprehensive and engages them with the information – giving them exercises to apply what they learn to themselves .
- An effective board orientation program delivers this information in steps and uses different methods.
- It allows for reflection.

Summary

We have covered three mistakes nonprofit leaders make orienting board members. Their board orientation (if they have one):

- is incomplete;
- doesn't inspire and engage board members; and
- is inconsistent.

And the tips/strategies you can use to avoid these mistakes. Be sure to take some action steps now. What will work for your nonprofit?

Using the practical strategies presented here, you can create an effective, comprehensive board orientation system for your nonprofit — one that is consistent over time and gets your new board members off to a great start!