

NEW DIRECTOR ORIENTATION

20 Critical Components



STEP-BY-STEP

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20 Critical Components

For New Board Director Orientation

If there were one thing many nonprofits could do to significantly improve their board's effectiveness it would be to improve their new board member orientation efforts.

While many agencies are good at recruiting high quality candidates to the board, they risk losing them over time because the new directors have little or no understanding of what is expected of them.

Eventually, they either leave the organization because they become board, feel overmatched with the long serving directors, or just don't know how to get involved.



This document suggests ways to help new directors get up to speed quickly on the inner workings of the agency and key things he/she needs to know so they can get involved quickly, begin serving and provide value.

Many agencies have no formal process for this, which often results in high quality directors leaving early or never fully engaging with the board at optimal levels.

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20 Critical Components For New Board Director Orientation

1. **Mission/Vision/Values**
2. History of the organization
3. Organizational structure
4. Current strategic direction, key initiatives, & goals



5. **Roles and responsibilities of board members**



6. Specific roles and responsibilities of each board committee and board member
7. Legal obligations of nonprofit boards
8. Role of board vs role of staff and volunteers
9. Role of staff in serving the board/board committees
10. Role of committees in helping the board do its work
11. Relating to constituencies (key collaboration partners, volunteers, government, donors, foundations, etc)

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12. Process for identifying, selecting, orienting, evaluating, board members

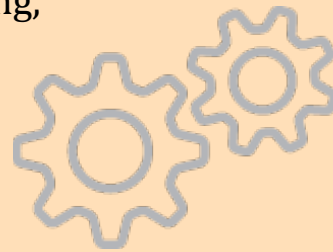
13. Conflict of interest policies

14. Budget process and audit

15. Current finances

16. Overview and training in each program offering

17. Overview of significant issues currently faced by the board



18. Fundraising – General fundraising basics



19. Specifics of how this new director can make an impact on the board

20. Past major successes, current projects, and significant new projects on deck (to provide context for a new director as they join the board)

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