



## **Keep 'Em Sharp: Hone Your Board With Regular Training**

We've all heard the adage about the woodcutter too busy to pause and sharpen his axe (he wound up beating trees with a dull piece of iron!).

It's an analogy that certainly applies to today's nonprofit boards. You've recruited busy, in-demand people for your board. They only come together a few times a year. To keep them focused and sharp, you need to provide proper orientation and training.

### **Start at the Start**

In the rush to staff your board, it's easy to overlook orientation. But, when welcoming a new board member, the second thing out of your mouth (right after "we're so glad you're here") should be "our board orientation will be held on ..."

**Why:** Board orientation prepares new members for their board role. It can also be a strong team-building exercise for your entire group. For new members, orientation helps set the expectations that you as an organization have of your board members.

**When:** Once a year, either before a regular board meeting or during an annual retreat. The best time for orientation is shortly after new members are elected, which helps your "newbies" quickly gain an understanding of their roles and often increases their participation.

**Who:** New *and* existing board members should attend. It's amazing how quickly the "basics" can be forgotten by even

highly experienced board members. Recurring training helps to ensure that board members are all working from the same script.

**What:** The board chair and the chief executive typically facilitate the orientation session. Topics can include:

- Overview of organization (history, mission, vision and values)
- Orientation to board manual
- Roles and responsibilities
- Overview of board structure
- Overview of board operations
- Review of strategic plan
- Roberts' Rules of Order

**How:** Board orientation is *vital* important, so don't skimp. Consider these tips for creating an orientation session with impact:

**Assign a "buddy."** Consider pairing tenured board members with newer ones to assist with orientation.

**Go by the manual.** Your board manual should be a key component of your training session. As you know, it is a crucial resource for members to collect, organize and reference resources needed to carry out their roles as board members.

**Involve them early.** Involve new members as soon as possible in relevant committees.

### **Keep It Ongoing**

Ongoing training is crucial — but nothing elicits more board member groans than irrelevant, unproductive or ill-timed training. So put some time and thought into creating training that meets needs and furthers your organizational goals.

**Focus training on specific needs.** Here's where a board self-evaluation can really pay dividends. For example, if your board is telling you they don't understand their roles as board members, then ensure that training places strong focus on this topic.

**Design at a high level.** Board training should be designed and managed at the chief executive officer and board chair level. In an ideal situation, you would have a Board Development Committee whose chair can provide strong participation in the training.

**Give them homework.** Provide the training agenda and materials to members at least two weeks before your training session and ask participants to review the materials before the meeting.

**Train for a diverse board.** Board diversity is becoming increasingly important. Train board members and staff on the value of diversity and develop written materials that define clear goals and objectives related to increasing the diversity of your staff and board. As your board becomes more diverse, you may also need to conduct training that sharpens relationship-building and communication skills between different groups.

**Train for liability.** In the wake of Sarbanes-Oxley, many potential and current board members have a newfound awareness of their liability as board members. Address their concerns by providing some basic training on federal and state laws as they relate to the duties of board members. Make sure board members also know that it is important to attend and prepare for meetings, ask questions and address potentially unsound or imprudent decisions.

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