BOARDSOURCE®

201 KEY ISSUES

YOUR BOARD DEVELOPMENT PLAN

Developing, educating, or building your board all have the same objective: to create an effective board that is conscious of its own role and responsibilities, motivated by the mission of the organization, willing and able to actively participate in board leadership, and qualified to guide the organization toward progress. A good board development plan will promote board members' continuous growth and learning.

Governance committee

Create a governance committee by expanding the role of your nominating committee to embrace board orientation and continuing training. This is potentially the board's most important committee. Besides identifying and cultivating qualified candidates, this committee is responsible for providing job descriptions for board members; clarifying future expectations; ensuring that new members are familiar with the organization and general board practices; keeping veteran members equally informed, motivated, and active; reviewing bylaws; administering self-assessment; and planning for leadership succession. The governance committee is instrumental in organizing board orientation, helping to plan annual retreats, and arranging other training possibilities for board members.

Recruiting by informing

Start educating potential board members during the cultivation phase. Make sure that candidates get to know your organization. Introduce them to the culture of the board by inviting them to attend a board or a committee meeting. Openly describe meeting attendance policies, personal contribution requirements, and expected committee assignments. The purpose of clarifying the roles and expectations for the candidates is to avoid surprises later on. Knowing the ropes ahead of time forces a candidate to make a commitment before accepting to serve on your board.

Orientation

No matter how diligently candidates have been prepared for their future role, nothing replaces formal orientation for new members. This is a group process. New board members get to know each other, the rest of the board, and reacquaint themselves with the chief executive. Orientation introduces the new board member to the organization in detail and provides guidelines for the rest of the term. Organize an initial orientation session that lasts a few hours or half a day and then continue with different methods and tools. Some boards include a special induction ceremony, which may involve signing a board member contract. Every orientation should include a board handbook, manual or a dedicated intranet site that will serve as a permanent compilation of relevant information.

Orientation tools

Board handbook Consider a board handbook to be a board member's memory and reference to anything he or she needs to know about the organization and his or her role as a board member. It is usually compiled by staff and must be updated regularly to reflect changes in policy and new programs and plans. The board manual should include the history and general description of the organization, all legal documents, financial data, organizational strategic framework, and other board-related information. Board documents include contact and biographical information for all board members, meeting dates, committee job descriptions, responsibilities of board members, board policies, and meeting minutes.

Mentoring system Many boards establish a mentoring system in their orientation program to provide individual support to a new board member by teaming him or her up with a more experienced peer. This makes the process friendlier and it tends to accelerate learning. The mentor is available to answer questions and to guide the newcomer through the novel experience.

Board retreats

Annual board retreats are an excellent tool to help your board continue its own education. Board retreats are special meetings organized around an issue too significant to be handled properly within a normal meeting agenda. Most boards can benefit from an annual retreat simply to strengthen relationships and focus on future challenges. Besides using retreats for orientation, they are ideal for refreshing board members' understanding of their responsibilities, strengthening of board relationships and team-building, and naturally for working out a critical issue or a topic of strategic importance.

Self-assessment

With periodic self-assessment, the board is able to take its own temperature and decide how it is doing actually. To maintain high standards, it is necessary to periodically evaluate one's performance. By engaging in self-evaluation, board members are able to look at their own accomplishments within their peer group and judge whether they have reached their objectives. Self-evaluation is also a tool for judging the effectiveness of the overall board education system.

After board service

Don't forget to keep former board members informed on the activities of the organization. They are valuable ambassadors and remain committed if they are kept active via periodic communication.

References

The Board Building Cycle: Nine Steps to Finding, Recruiting, and Engaging Nonprofit Board Members

Board Self-Assessment: Assess to Advance

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