

After the First Conversation

In October 2012, first Nonprofit Companion edition was article titled “It Begins with the First Conversation.” The article outlined a system for creating a strong program of cultivation and recruitment of new Board members. The system delineated the steps from identification, to cultivation, to bringing the potential board member to the point of being asked to join the Board. The article can be found on our website at: www.dewittandassociates.com. It is under the Resources line.

This article is a follow-up to the October article. It assumes you have been successful in recruiting the type of individual(s) who will help your board grow and become more effective. We assume you have recruited people who are attorneys CPAs, community leaders and others who will fill needs for new talent within your board, will add to the Board’s talent pool, and that new recruit understands the role he/she is anticipated to play.

Now that these individuals have made a commitment to serve your organization, we want to give you the next steps in their continued cultivation.

Relationship Building:

What is the next “Move’ in your continued cultivation new vitally important volunteers? There are two directions one should take at once. First is the ‘soft side;” it is important that new board members are comfortable with the board and the board becomes comfortable with the people they have chosen to influence the dynamics of the board. One way to ease the transition for everyone is to have an informal social gathering at a board member’s home or a nice venue that will encourage conversation and getting acquainted. Actions in the board setting are improved when all board members understand the backgrounds and attitudes of individuals whom they are serving.

The next step is the staff response to new board members. The nonprofit business CEO is a key to the to the new members success. Since there have been several meetings during the cultivation and recruiting process, it is time to begin the orientation process. This is not a substitute for a formal orientation, but an opportunity to strengthen the process by what is learned in these meetings. First, verify the information that was gathered during the recruitment: past involvement in other boards, offices held, and the feeling of satisfaction with the previous experience. This will give the CEO a feeling for the new member’s expectations. The CEO is solidifying the connection with the new member and developing the communication channels that will work effectively with this new member.

Second, discuss the structure of the board and committees. Seek the new members input an initial assignment to a committee, or committees. If the board member has a particular interest, the individual will engage more quickly and feel more at ease in the initial interaction at meetings. Based on the new member's experience and the needs of the board, the CEO can make solid recommendations to the Board Chair about committee assignments.

Third review the operating structure of the nonprofit business. Discuss staffing levels and particular assignments of key staff. Review the volunteer structure of the operation and how board members can and do participate in these activities. This is also a time to discuss the interaction with the staff and appropriate communication channels with the staff. Without being "heavy handed," it is important for new members to understand their role as policy makers; not directors of the operation

Orientation:

The previous steps are a beginning of the communication and orientation process; however, there is need for a formal orientation. This activity should involve both the senior members of the Board of Directors, the CEO and senior staff members. This program should provide materials for review for the new board members prior to the meeting. It will stimulate their thinking before the meeting and remove some of the mundane. The purpose of this event is to prepare the new member(s) for the first Board meeting and committee meeting.

The Orientation is a Board of Directors function! As such, the senior board members will lead the discussion of each topic and respond to questions. The CEO and staff are resource people at this meeting. The CEO should have briefed the board members about clues as to interests and concerns new board members have expressed in prior meetings with the CEO.

Items to be reviewed:

- Review the mission and goals of the nonprofit business
- Review near-term goals related to the next year's operation
- Review the draft agenda for the upcoming meeting
- Discuss of a Consent Agenda process, if this technique is used
- Discuss the reason for educational portions of the board meeting and purpose
- Review Board meeting schedules at least for the next twelve months

- Provide a list of locations of Board and Committee meetings
- Describe how Board members request items in the be placed on the agenda
- Provide an overview of Executive Sessions and their purpose
- Review of the committee structure and meeting schedules
- Discuss the system of rotating committee assignments among board members and the purpose creating a more knowledgeable Board

Finally, the new board member should meet their Board mentor. The mentor will be assigned the responsibility to work with the new board member for the first year of their service. Mentorship recognizes the talent of a more seasoned member and strengthens the mentor's relationship with the organization. It demonstrates to the new board member that the nonprofit business is serious about building a cohesive organization.

The Board Chair and the CEO will have gone through a deliberative process in making this assignment. The Board mentor should be person who will interact well with the new member, be accessible between meetings to answer questions and guide the new member through the culture of the Board.

The Orientation should be held, optimally, several weeks before the first meeting. This provides the new board member(s) an opportunity to digest the material before attending their first meeting. The Board Chair and the Mentor should follow-up before the board meeting to respond to questions and clarify information. This will provide a comfort level for the new board member and build the relationship with the board.

Performance Monitoring:

The Board Chair, Board Mentor and the CEO are responsible for this program and process. The process is designed to insure that new Board members have a successful start to their board service. Additionally, the program provides valuable information about the organization's communication and effectiveness with its senior volunteer leadership.

There is common remark made by seasoned board members about new board members: "He or she does not get it and they don't seem to be engaged." Likewise new board members say: I don't understand a person's attitude, or I am lost in the board meeting."

These are common symptoms in any Board setting. The solution is Time and Communication. The CEO is the monitor of the entire process. In addition, there are specific actions that can ease the transition:

- Mentors and CEOs should contact each new member after each meeting to answer questions and gage responses to board or committee actions
- The Mentor and the CEO should coordinate an informal educational program for the new board member. These may have common elements for all new members and specific elements for each individual based on their previous board experiences.
- The CEO and staff need to communicate about how the new member relates to other board members in committee meetings and how the individual interacts with the staff.
- The Board Chair should have an informal meeting with a new board member after six months. The purpose of these one-on-one encounters is to build strong relationship within the board itself.
- The Board needs to assess its own progress in achieving the goals it has set for itself. One method of self-assessment is the annual written survey. By comparing the responses of new board members and seasoned members the organization can learn about Board members attitudes and develop ways to improve communications among the entire board and with its constituencies.

Other Building Blocks:

Cultivation of all of your Board of Directors is a continuing process regardless of their experience with your board or other boards. There are actions that can be taken during each year to build board loyalty and dedication:

- At least annually have a social event to involve board members and their spouses or their significant others. Board members donate their time, their talent and their treasure to your nonprofit. The families of the board members will support what they understand and appreciate.
- Develop a list of events where board members have an opportunity to interact with clients and see the program in action. Invite board members to specific events; they will not respond generally to open invitations. Provide an opportunity to actually participate in some activity at the event.

- Design opportunities for board members to actively engage with doors and supporters, where appropriate. The key to these efforts being successful is the thorough briefing of board members before the actual event.
- Always seek Board input on major issues. Board members do not like surprises.

Boards need to be reminded of their role constantly in:

- Mission adherence
- Solid financial success
- Active pursuit of additional resources by giving and getting