

“Training – The Key to Board Effectiveness

By David J. Baker, APR, Senior Counsel

A retiring board member once said that he regretted having had so little impact during his three-year tenure. Asked why he felt he had not accomplished much, he replied: “The first year we don’t know what is going on. The second year we are moved between different board committees and the third year we rotate off. It is as if we are deliberately kept in the dark.”

This may be an extreme case--let us hope that any committed board member would demand to be better informed--but it is not untypical. Board members need to be not just informed, but educated about their nonprofit, made aware of their responsibilities and duties, and trained to carry them out. This doesn’t always happen.

Most board members are attracted to an organization by its mission. They want to be part of whatever the nonprofit is about. Sometimes they are recruited by another board member or by the CEO because they create diversity, or they bring a specific skill or knowledge. They are not always told more than, “It’s just four meetings a year,” or, “No, you won’t have to ask for money,” and so they come to the board without much of an idea of what is expected of them, or worse, with an idea that was misrepresented.

Compare it to how anyone would feel if they were hired to fill a position and there is no job description, no duties, and no idea of what is expected. No one would put up with that, but new board members sometimes do.

Every nonprofit should have a training plan for board members. New board members should be given a job description and have orientation and training when they first join the board. All board members should have refresher training once a year.

What every board member should know

The board of directors is responsible for delivery of the program the nonprofit provides and to ensure the provision of appropriate funding. To accomplish this, board members must:

1. Decide the mission of the nonprofit and review its appropriateness each year;
2. Hire and evaluate the executive director;
3. Ensure funding for the nonprofit through budget approval, financial controls, and development;
4. Participate in strategic planning and goal setting;
5. Monitor legal and ethical standards.

Not everyone can do everything—that is why there are board committees. Members will generally be assigned to one or more committees, depending on areas of interest or expertise.

The one duty of board members that all must share is development. Every board member must be a contributor to the nonprofit: this is vital to fundraising because if the board members are not all donors, why should anyone else be? To put it bluntly, the requirement of board members are, give, get, or get off the board. There may be a rare exception where someone will be recruited to a board because of a special skill, but who cannot be a major donor; nevertheless, in general, all are expected to support the nonprofit's annual fund.

Board Committees

A well-constructed board will have several standing committees of the board. These will include:

- i. Executive Committee
- ii. Governance (Nominating, Board Affairs) Committee
- iii. Finance Committee
- iv. Investment Committee
- v. Audit Committee
- vi. Program Committee
- vii. Development Committee

There may be others, depending on the mission of the nonprofit and the issues it faces, but these are the essential ones. New board members should expect to be assigned to one or more committees and be given appropriate training so they can be effective.

Orientation

New board members should have the opportunity to meet fellow board members and senior staff early in their tenure on a nonprofit board. They should be given time to interact with all of them and understand what each does. New board members should have a thorough tour of the nonprofit facilities and understand who the clients are and how services are delivered. The orientation is necessarily highly detailed, and should be spread over several days.

Specific training

Following orientation, each new board member should have training specific to the committee they will serve on. Under the guidance of the committee chair, each should meet with appropriate staff and learn how things work and what

systems are in place to achieve the desired result. A specific example might be nominees to the Development Committee who would meet with the committee chair and senior development staff. They would learn about goals and programs and understand why the nonprofit has chosen specific strategies to achieve those goals. This opportunity to ask questions and understand plans for development is invaluable for the new members. Not only does it give them the knowledge needed to participate fully at board meetings, but also it avoids the embarrassment of ignorance, which may lead to nonparticipation.

Refresher training

If your nonprofit board members have had this sort of initial training, they will be well prepared to contribute at board meetings as well as at committee meetings. Even so, additional training and education is necessary to keep them fresh and stimulated.

An annual training session at a board retreat is an ideal occasion to tell the board about achievements in the past year; to discuss challenges; to talk about what is new; to introduce new programs; to feature a department and its accomplishments; to test new ideas. A guest presentation on the responsibilities of the board is a good way to enrich program content. Most important is to provide time for fellowship so board members can become better acquainted. The retreat program should be much less highly detailed than the orientation. Offer just one big subject at a time.

The key to a rewarding experience as a board member is ensuring that new board members understand what they are getting into, what their responsibilities are, and what is expected of them. Every nonprofit can make this clear to everyone through a well-planned education and training program.

Remember, a board of directors is only as effective as its members have been trained to be. If you keep them in the dark, they will not contribute as they should, and eventually they will become an impediment as they try to become involved in ways that are inappropriate. Look around at nonprofits that you know. The best managed ones are the ones with a committed and involved board that knows what its role is.

Board Source offers a wealth of resources for creating your own training program. Check out www.boardsource.org.