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A Framework for Success: The Importance of Board Member Orientation

Abstract

Volunteer groups such as master gardeners, watershed stewards, beach watchers, and 4-H councils are a tremendous asset to the university extension system, making it possible to greatly expand the reach and depth of Extension programming. Often these groups are overseen and advised by a volunteer board of directors. Conducting a simple board orientation is an effort that can increase the groups' effectiveness. An Extension professional, using basic facilitation skills, can lead a board through six topics of discussion, with the intended outcome being a more effective board. Extension professionals facilitate meetings regularly, so by simply adding this important educational endeavor to routine work, they can increase Extension's impact.

Keywords: [board orientation](#), [member education](#), [board effectiveness](#)

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Introduction

Volunteer groups such as master gardeners, watershed stewards, beach watchers, and 4-H councils are a tremendous asset to university extension systems. These groups greatly expand the reach and depth of Extension programming, making it possible to offer a wide variety of educational opportunities. Often these groups are overseen and advised by a volunteer board of directors. Having a well-supported, trained, and knowledgeable board of directors tremendously enhances the effectiveness of these educational groups. A simple board orientation is one important effort that increases this effectiveness. An Extension professional, using basic facilitation skills, can lead a board through six basic topics of discussion, with the intended outcome being a more effective board. Extension professionals facilitate meetings regularly; by adding this easy-to-implement additional educational resource, they can increase Extension's impact.

Situation

A significant body of research exists indicating that nonprofits should invest in continued board member development (Brown, 2007; Herman & Renz, 2000). For example, University of Nevada Cooperative Extension surveyed 92 community members, and a common theme that emerged was the importance of board member

orientation (Hinton, 1994). Additionally, a Texas AgriLife Extension Service survey of 236 volunteers showed that an increase in training and orientation was needed (Ripley, Cummings, & Lockett, 2012). In a 2012 survey of 114 nonprofit executive directors, respondents indicated that conflict between directors and board members was a major issue and that strengthening board member orientation and training could be a solution to the problem (Marx & Davis, 2012). The potential for boards to have conflict and poor performance is directly related to the level of training received by new and existing members. To increase the success of boards, board orientation and ongoing professional development are recommended.

Opportunity

Conducting a board orientation may seem like a complex endeavor; however, such an orientation can be accomplished in a meeting setting, and running a meeting is a common practice among Extension professionals. And the payoff from conducting a board orientation can be high. A quality board orientation ultimately results in positive benefits to board members, staff, and clients. One likely outcome, for example, is that board members will better connect with and trust one another (Jaskyte & Holland, 2015). Simply put, through increased education, boards become more effective and successful (BoardSource, 2015).

There is an overwhelming amount of information board members need to know about working with their specific organizations. Listed below are six general areas of interest to cover at a basic board member orientation and some guiding questions to direct discussion.

- *Mission and vision of the organization.* Identifying the organization's mission and vision keeps board members focused on purpose. Guiding questions are as follows: What parts of the mission and vision do you connect strongly with? What skills do you bring to help the organization reach its mission?
- *Current board direction and goals.* A strong understanding of current board priorities and goals helps members connect with the work. Guiding questions are as follows: What current board priority do you most identify with? What excites you/what hesitations do you have about the current board direction?
- *Culture of the board (i.e., roles and responsibilities of members).* Reviewing the job description and responsibilities of board members builds common understanding. This allows members to "hit the ground running" to achieve organizational goals. Guiding questions are as follows: What are the meeting requirements for members? Is there anything about your role with which you would like help?
- *Governance structure and decision-making process.* All boards operate differently. Some boards work primarily through committees, and others work collectively with organizational staff. Conflict can easily occur if members are unclear about the governance structure of the board. Guiding questions are as follows: Does the board use Robert's Rules of Order or a consensus approach for decision making? How are disagreements handled within the board?
- *Organizational performance measures.* Evaluation data can show what has been going well and not so well for the organization. This information is useful for board action planning and decision making. Guiding questions are as follows: What types of evaluations will be useful for board members? What will the board do with evaluation data?
- *Basic dos and don'ts for board members.* Unwritten rules and expectations for board members sometimes

exist. Identifying and sharing these allows new members to avoid conflict. Guiding questions are as follows: What is discussed in meetings versus committees? When speaking about the organization, do board members represent themselves or the whole organization?

Figure 1 is a sample agenda that can be modified to fit a particular board member orientation.

Figure 1.

Sample Board Member Orientation Meeting Agenda

Topic	Duration
Welcome	5 min
Meeting expectations	5 min
Mission and vision of the organization	10 min
Current board goals and how they are supported by the board	15 min
Culture of the board/member roles	10 min
Governance structure and board decision making	15 min
Suggested dos and don'ts	15 min
Closing	5 min

The intent of each topic listed above is to provide a foundation to build on throughout the year. If an orientation cannot be scheduled at the beginning of the organizational calendar, those facilitating board member training can review and educate board members on the topics throughout the year. Any of the six topics can be added to any board meeting agenda. After the orientation, implementation of best practices is the responsibility of board members (Brown, 2006). It is important to educate board members and state that items covered during an orientation session have the purpose of helping them improve their effectiveness.

Results

We used the meeting agenda shown in Figure 1 with 18 boards over a 3-year period. Notably, member involvement and member effectiveness increased. In a survey conducted immediately following one board orientation addressing the topics listed in Figure 1, five of the 10 board members reported having a better understanding of the board on which they served. One year following a board orientation, a board president said the orientation had helped board members "stay focused throughout the year." Another board member commented, "It was a step in the right direction getting us to think outside the box and do something during the off season besides attend monthly meetings." An executive director of a county-wide large nonprofit commented, "Investing time into a board member orientation sets the tone for the year. Members have a clearer expectation and seem to hit the ground running right away. This is time and resources well spent."

Conclusion

The more opportunity a board member has to be oriented, the better equipped he or she will be to serve the organization. A board member orientation is another added value an Extension professional can provide to outside partner agencies and internal advisory boards. When Extension assists in creating strong and well-

functioning boards, the greater assets those boards become with regard to helping Extension accomplish its mission.

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