

October 2020
bob@rchcae.com

Conducting Virtual Board Orientation

Bob Harris, CAE

Fall and winter months are prime season for board transition and orientation. Because of the pandemic, most board trainings will occur virtually.

Rather than postponing orientation, do it online with an emphasis on these areas. The 20-page [Board Orientation Workbook](#) is available free to support the process.

Entire Board – A frequent question about orientation is whether to include only new directors or the entire board. The answer is the full board. If there is resistance because they've already had the training, position it as “refresh and blend.” This is the time to make everyone feel confident and comfortable in their duties.

Governing Documents – Distribute the governing documents in a notebook, memory stick or through internet access such as Dropbox. Be certain to note in the minutes that all directors received the documents. The doctrine of volunteer immunity is based upon directors working within the governing documents.

Program of Work – The budget, financials and strategic plan are ever dynamic. Report on their status and progress.

Fiduciary Duties – Often directors say they know their fiduciary duty is to raise money. Clarify that a fiduciary represents the interests of members through the duties of care, loyalty, and obedience.

Conflicts of Interest - The IRS queries exempt organizations if a policy exists on disclosing conflicts of interest. Use orientation to discuss conflicts and the process for disclosure.

Protections – Describe the protections afforded the board. These usually include: 1) directors' and officers' insurance, 2) indemnification, 3) corporate veil, and 4) volunteer immunity.

Risk Management – A role of the board is risk awareness and avoidance. Share examples of how to avoid risks related to serving alcohol, finances, copyright laws, and antitrust violations.

Meetings – Discuss the year's calendar and meetings. Explain processes that make for more effective board meetings, whether on-line or in person.

Familiarization – Orientation is like a tour. Introduce directors to the organization’s structure, milestones, achievements, and mission.

Financial Acumen – Explain the process associated with budgeting and financial reports. Ensure understanding about IRS Form 990 and requests for public records.

Orientation should be a high-impact 1 to 3- hour session led by an executive or consultant who can communicate the importance of good governance.

#

Note: Bob Harris, CAE, provides free governance tips and tools at www.nonprofitcenter.com

Link to the free workbook referenced in the 2nd paragraph.

<https://www.dropbox.com/s/ahg08qpabfry3wf/Board%20Orientation%20Workbook%2020-pgs%20rev%20June%202020.pdf?dl=0>