

Endow
Manitoba



Learn.
Lead.
Legacy.



Board member orientation best practices Governance

Saturday, Oct. 29, 10:30 a.m.



Your facilitators

Chris Esau

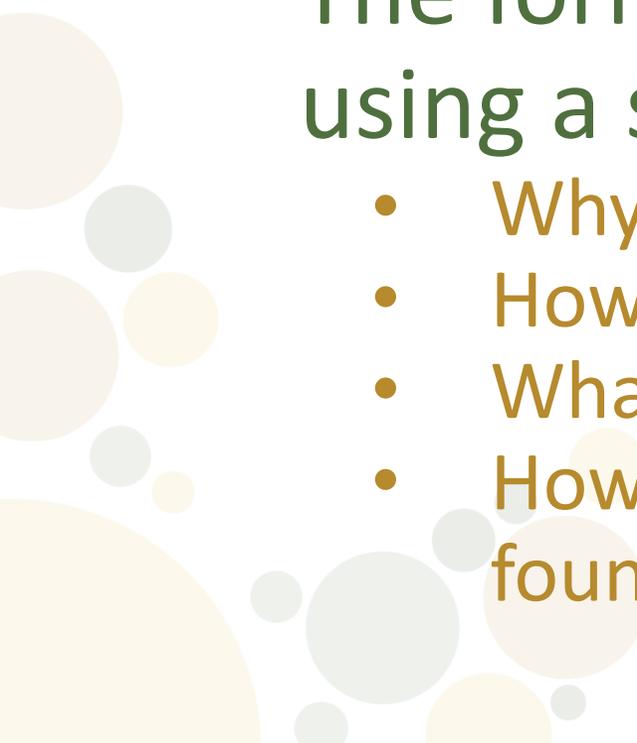
The Steinbach Community Foundation
Vice Chair

Lynda Lambert

The Winnipeg Foundation, Endow Manitoba
Community Foundations Coordinator
South Central Region



Our approach

- The fundamentals: cellphones and washrooms.
 - The goal: create a *fun, safe and engaging* space.
 - The format: share knowledge and experience using a structure of:
 - Why is this important?
 - How do you do it?
 - What is the outcome?
 - How can I apply this learning with my community foundation?
- 



Our philosophy

- *You* are the expert of your community and your community foundation.
- Please share your *thoughts, knowledge, and experiences* so that we can all learn from each other.





Why is board orientation and training critical for new board members?

Take a worksheet and **write** down your answer.



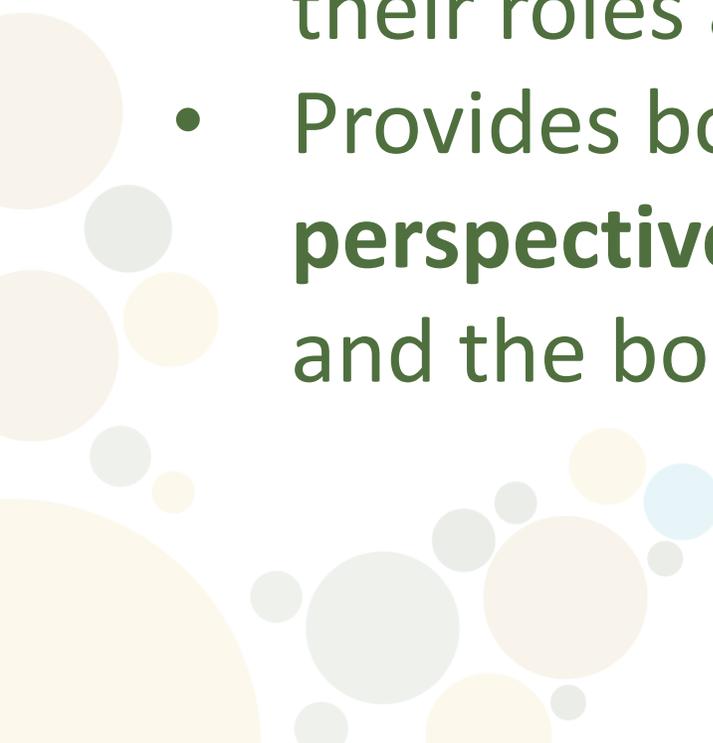
Chris Esau

The Steinbach Community Foundation





Definition: Board member orientation

- A process that helps new board members **learn** all the **relevant information** they require to undertake their roles and responsibilities.
 - Provides board members **history, context, and perspectives** related to the work of the foundation and the board.
- 



Why is board orientation important?

- Aligns new members on the **role, value,** and **function** of the community foundation.
 - Fosters **engagement** in the work of the board and the foundation.
 - Reinforces a culture of **inclusion** and **connection** between new and existing board members and staff.
 - Allows new board members to "**hit the ground running**" and reduces the frustration some new members feel who don't quite "get it" and feel underutilized.
 - Supports board succession planning by providing clear insight into **board member roles** and **responsibilities**.
- 



Why is board orientation and training critical for new board members?

Reflect on original response.

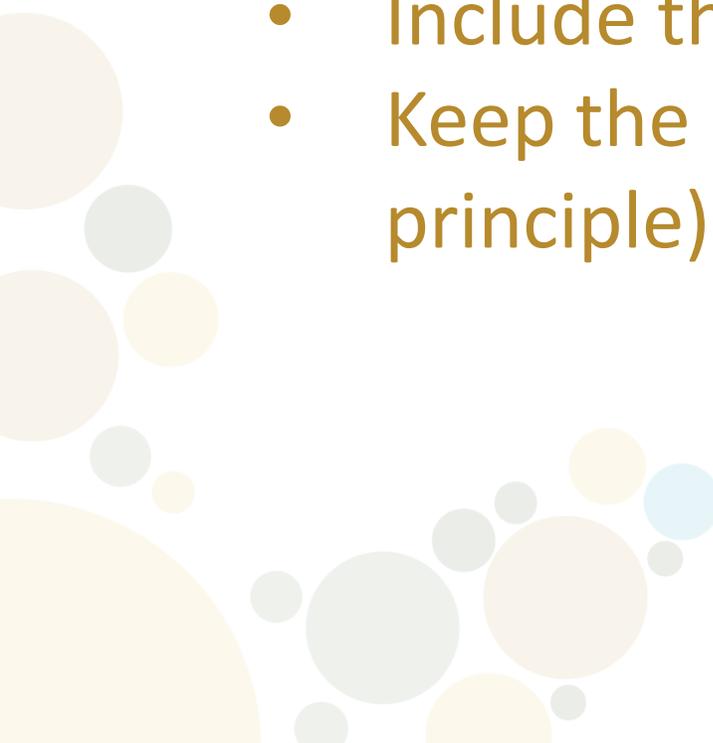
How might you adapt your response?



How to succeed at Board orientations

1. Decide the basics everyone should know.

- Focus on core concepts/functions that support your work.
- Include the natural cycle of CF activities/milestones.
- Keep the amount of information easily digestible (KISS principle).





How to succeed at Board orientations

2. Host the orientation session(s!!!)

- Hold the orientation over multiple AND accessible small sessions (lunch & learns).
- Focus each session on a core concept/function of the foundation.
- Include as many current board members as possible – culture/experience matters.





How to succeed at Board orientations

3. Rinse and Repeat

- Not just about new members – repeat process regularly to reinforce learning throughout board and staff.





The outcomes of effective board orientation

- Increased **engagement**, and **participation** in activities by ALL board members (not just "veterans").
 - Evidenced by meeting attendance, constructive conversations.
 - Increased **confidence** of board members in connecting and engaging with community.
 - Evidenced by donor conversations, inquiries to foundation.
 - Ease in **succession** planning.
 - Clear identification of role on board to be filled and required skills and community perspective.
- 



Board orientation

How often should community foundations conduct board orientation sessions? Why?



Board orientation

What was the hardest thing for you to understand about your community foundation or role on the board? What could have helped you understand that faster/better?



Board orientation

Exploring YOUR challenges:

- What is your greatest challenge with respect to effectively orienting new board members to the work and role of a community foundation?
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Discuss in group. Share with all.



Shared reflections

Board member orientation best practices

Governance

What's one key takeaway or "AHA" that you want to remember?

What are you curious about now?



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Thank you

Endow Manitoba is an initiative of The Winnipeg Foundation