

Orientation Checklist for New Board Members

As you plan your New Board Member Orientation Program keep in mind the following objectives:

- Assessing where the new board member's interest and experience lies
- Clarifying Board Roles
- Introducing the Board "Culture"
- Sharing information on how the organization functions

All board members should have a notebook that includes:

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|---|--|
| <input type="checkbox"/> Board member roster with phone numbers and email addresses | <input type="checkbox"/> Committee structure |
| <input type="checkbox"/> All policies | <input type="checkbox"/> Board organizational chart |
| <input type="checkbox"/> Strategic plan | <input type="checkbox"/> By Laws & Articles of Incorporation |
| <input type="checkbox"/> Meeting minutes of the last 6 months | <input type="checkbox"/> Mission Statement |
| <input type="checkbox"/> Current budget | <input type="checkbox"/> One page "talking points" document about the organization |
| <input type="checkbox"/> Latest financial reports | <input type="checkbox"/> Brief history of the organization |
| <input type="checkbox"/> Revenue sources | <input type="checkbox"/> Staff organizational chart |
| <input type="checkbox"/> Copies of past Executive Director reports | <input type="checkbox"/> Other resources about board service |

The organization should have the following signed copies from all board members:

- Confidentiality statement
- Commitment to serve statement/job description
- Biography form
- Donation pledge

Orientation meeting agenda items:

- Overview of board meeting mechanics and first meeting – when, where, what to expect, how the meetings are run – have a veteran board member do this with joy and enthusiasm!
- Overview of the long term vision, the mission, the need for committed board members, expectations, etc.
- Orientation kit (in notebook) – what to read, what to bring to board meetings, what to sign and return to the Chair/President
- Tour of facilities – The Executive Director can introduce board person to staff. If the work isn't conducted at the facility, arrange and schedule a way for the new board member to observe the organization providing their service to clientele
- Review of current issues with the Executive Director and/or Board Chair
- Board roles and responsibilities
- Mentoring – match the new board member up with a veteran so they have a contact to call and ask questions they may not feel comfortable bringing up in the middle of a meeting.

At the first few board meetings:

If you don't use name tags or name table tents, go around the room and quickly say your name and association.

Check in with the new board member after the meeting to answer any questions they have.