

# New Board Member Orientation

## *Checklist*



## Educating and Enthusing New Board Members

Orientation of new board members is a key step in making sure that new board members begin their board service with the knowledge they need to make decisions. It's equally important to make sure they are engaged from day one.

This checklist will help you plan a comprehensive new Board Member Orientation that will both educate and enthuse.

- ✓ Schedule a group Board Orientation for all newly elected Board Members before their first board meeting.
- ✓ The Orientation should be conducted by experienced Board Members, preferably the Board Chair, Vice Chair and/or Board Governance/Nominating Committee Chair and the Chair of the Finance Committee. Other Board Members, the Executive Director and key staff should also attend.
- ✓ Orientation Agenda
  - Organizational History
  - Key provisions of by-laws (e.g. term limits, attendance requirements)
  - Board Member Job Description – New board members will have already seen the job description prior to agreeing to serve, but it's always a good reminder during orientation.
  - Board Member Roles and Responsibilities – Beyond the organizational expectations, all nonprofit board members have certain legal and fiduciary responsibilities. Many nonprofits use the 10 Board Member Responsibilities from BoardSource. This is a good time to reinforce each board member's commitment and responsibility in fund raising.
  - Organizational Structure – Share the Organizational Chart outlining
    - Board Committees – This is a good time to get a commitment of which committee the board member will serve on, if they have not made a decision yet.
    - Organizational Programs and Services – Briefly describe each of the organization's programs and services. This could be postponed until a facility tour, or could be reinforced during the tour.
  - Strategic Plan Overview
  - Financial Responsibilities – Explain financial statements, the organization's financial position and the process of filing the 990 form.

- Board Member Binder – Many organizations provide board members with a three-ring binder to organize and maintain important board documents such as those described above (by-laws, strategic plan, job description, organizational chart). You should also provide the following and review them with new board members:
  - Annual Calendar of Meetings and Events
  - Board Member Roster
  - Contact Information for key staff
  - Minutes from the last six (or 12) board meetings
- Technology – Describe how the board receives/shares information prior to board meetings (e.g. Google Docs, Dropbox, email)
- Facility Tour and Introduction to Key Staff
- Q & A

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