

Board Orientation Strategies

Sample Board Orientation Checklist

Here are items to consider in developing an orientation session for new Board members. Much of this information will be covered in the Board Manual, but should be reviewed with new Board members to ensure they are comfortable with the information.

Provide General Information	
➤ History of the organization	
➤ Organizational / Board / Staff structure	
➤ Copy of constitution & by-laws	
➤ Vision & mission of the organization	
➤ Strategic priorities, goals and objectives	
➤ Summary of the programs and services	
➤ List of Board members / staff and their contact information	
Roles and Responsibilities	
➤ Reviewed Board member's role	
➤ Reviewed Executive's / Officers' role	
➤ Reviewed staff roles	
➤ Reviewed committees and their roles	
➤ Discussed expectations for and of new Board members	
Policies and Procedure	
➤ Provided new members with Board policies and procedures	
➤ Reviewed Board policies and procedures with new Board members	
Financial Management	
➤ Discussed Budget process	
➤ Provide current year's budget	
➤ Provided a copy of up-to-date audited financial statements	
➤ Provided a copy of most recent annual report	
Other Information	
➤ Provided copies of minutes from previous Board meetings	
➤ Gave a tour of facilities and offices	
➤ Provided brochures and other promotional materials	
➤ Had new Board members sign required paper work (i.e. Oath of Confidentiality, Memo of Understanding regarding roles and responsibilities etc.)	