

Board Member Orientation Checklist

This checklist provides a high-level overview of what you might cover during a board orientation. It is common to give new board members an orientation packet or board binder (either hard copy or in the cloud). * marks tools you might share and review during orientation.

Typically the board chair and Executive Director lead an orientation, though you may have a board development chairperson who fills this role. It is helpful if at least one other board member attends to share their experiences.

About the organization

- History
- Programs
- Facilities (tour if appropriate)
- Website overview
- Annual calendar*
- Board list*

Organizational structure

- Articles of Incorporation*
- By-laws*
- Organizational staffing chart*
- List of staff/volunteers and their functions*
- Current list of policies and procedures*

Strategic direction

- Strategic plan*
- Work plan*

Finances

- Budget* and how it is developed
- Most recent financial statements* (and what to expect going forward)
- IRS Form 990*

Board member responsibilities

- Minutes from most recent meeting*
- Job description (for all board members)*
- Individual areas of focus (across board members)
- Board commitment form*
- Conflict of interest form (review and sign)*
- Committee expectations
- Fundraising expectations
- Meeting schedule*

Ideas to consider:

Provide new board members with a veteran **board member buddy**. Ask the buddy to have a separate meeting with the new board member to check in on their questions and make them feel welcome.

Connect with new board members **after 3 months of service**. Ask for feedback on the orientation process and check in that they feel valued on the board.