



Board Member Orientation

Section 1: Become Familiar with the Organization

- Brief fact sheet on the organization

What are board members trying to achieve?

What has the organization done in the past to achieve these goals?

What are the mission, vision, and values of the organization?

- Most recent Annual Report
- Brochure, Newsletters, and any other relevant communications materials
- Press clippings
- List of staff members or org chart

Section 2: Governance

- Board member job description or Board Roles and Responsibilities document

<https://boardsource.org/fundamental-topics-of-nonprofit-board-service/roles-responsibilities/>

- Board roster with contact information

Board member profiles.

- Calendar of activities for Board members

- Board Committee list and Committee job descriptions

Committee Charters if available

Most recent committee reports.

- Articles of Incorporation

- Bylaws

- Proof of Directors & Officers Insurance (D&O)

- Most recent Board meeting minutes (ideally the last 3 to 4 Board meetings)

Section 3: Strategy

- Current or most recent Strategic Plan

Board Member Orientation



Section 4: Finance

- Most recent Form 990
- Most recent audit

Planning and evaluating board orientation and onboarding:

Gather the input of current board members. What would have made their early days on the board better? What would have made them more productive?

Consider ongoing education and development. How will the new board member continue to grow and develop within the board?

Who is responsible for onboarding? Role (board chair) or committee?

Social Events or Gatherings (ongoing integration):

- Committee Roundtables
- Board Meeting Introductions/Ice breakers
- Board dinners
- Volunteer recruitment and integration