

New Board Member Orientation Plan

Topic Area	Goals and Content	Method	By Whom
History	<ul style="list-style-type: none"> • Provide historical information about the founding of the organization and key milestones. • Help new board members view their involvement as part of the journey of the organization. 	<ul style="list-style-type: none"> • Historical timeline • PowerPoint of history • Video, photos, news clippings • Old annual reports 	<ul style="list-style-type: none"> • Invite former board members in to speak about historical context. • Ask board members with longest tenure to participate as well.
Strategic Direction	<ul style="list-style-type: none"> • Present mission, vision, strategic plan, and current goals for the organization. • Provide context for how they can support organization. 	<ul style="list-style-type: none"> • Strategic plan • Business plan • Discuss goals and future dreams of organization 	<ul style="list-style-type: none"> • Board chair & executive director • Or chair of strategic planning committee
Board Roles and Operation	<ul style="list-style-type: none"> • Help new board members get acquainted with the board • Understand how the board operates • Learn roles and expectations of board members and committees. 	<ul style="list-style-type: none"> • Board manual/portal and expectation agreement • Board member profiles • List of committees • Meeting schedule 	<ul style="list-style-type: none"> • Governance committee chair • Board chair • Other board members as available
Finances	<ul style="list-style-type: none"> • Provide new board members with knowledge about funding streams, current fiscal status, overall fiscal health of the organization. 	<ul style="list-style-type: none"> • Most recent audit • Annual budget • Financial reports 	<ul style="list-style-type: none"> • Finance chair • Board treasurer • Board chair • Executive director • CFO
Programs	<ul style="list-style-type: none"> • Provide inspiration about why services make a difference, how mission is achieved. 	<ul style="list-style-type: none"> • Tour facilities/programs • Client presentations • Videos, program descriptions 	<ul style="list-style-type: none"> • Program staff • Executive director
Organization Structure	<ul style="list-style-type: none"> • Help new board member understand staff roles and how the organization operates. 	<ul style="list-style-type: none"> • Bylaws, organization chart • Key staff job descriptions • Staff presentations 	<ul style="list-style-type: none"> • Executive director • Senior managers
Fundraising	<ul style="list-style-type: none"> • Help new board member find their fit in fundraising strategies. 	<ul style="list-style-type: none"> • Fund Development Plan • Annual Appeal process • Events calendar 	<ul style="list-style-type: none"> • Chair of development committee • Board chair • Development director

