

## Board Orientation Chart

The following is an overview of the information that needs to be conveyed to new board members at their orientation. The materials can be presented in person and in writing at an orientation meeting.

| Information                          | Issues   | Presentation Options  |
|--------------------------------------|--|---|
| <b>About the Organization</b>        |  |   |
| <b>Program</b>                       | Offer new board members a feel for the work of the organization – what it does, whom it serves, what difference it makes – to get them emotionally and intellectually connected and motivated. | <ul style="list-style-type: none"> <li>• Tour of facilities</li> <li>• Observation of/participation in program activities</li> <li>• Presentation by client, member, or program participant</li> <li>• Video, slides, film presentation</li> <li>• Verbal presentations</li> <li>• Written materials</li> </ul> |
| <b>Finances</b>                      | Help new board members become informed about where money comes from, how it is spent, and the state of the organization's financial health, including their role in fundraising.               | <ul style="list-style-type: none"> <li>• Presentation by chief executive, chief financial officer, or treasurer</li> <li>• Background materials (most recent audit, budget, financials), graphically presented, if possible</li> <li>• Presentation of the fundraising strategy</li> </ul>                      |
| <b>History</b>                       | Provide sufficient knowledge about the past so that the present makes sense. Also, help new board members see their own participation as part of the organization's ongoing story.             | <ul style="list-style-type: none"> <li>• Stories told by "old timers"</li> <li>• Pictures</li> <li>• Written materials</li> </ul>   |
| <b>Strategic Direction</b>           | Present a framework for new members to participate effectively. Clarify the mission, vision, organizational values, and goals that inform organizational actions.                              | <ul style="list-style-type: none"> <li>• Presentation/discussion by the chief executive or board chair</li> <li>• Copy of strategic plan (or other documents, especially mission statement, if no plan is available)</li> </ul>   |
| <b>Organizational Structure</b>      | Help new board members understand who does what and lines of accountability.   | <ul style="list-style-type: none"> <li>• Copy of the bylaws, IRS determination letter</li> <li>• Organizational chart</li> <li>• Introductions to key staff members</li> </ul>  |
| <b>Board Roles</b>                   | Ensure that new board members understand the roles of the board.   | <ul style="list-style-type: none"> <li>• Presentation/discussion, preferably with the whole board involved</li> <li>• Written materials</li> </ul>  |
| <b>Board Member Responsibilities</b> | Ensure that new board members understand their own responsibilities as board members.  | <ul style="list-style-type: none"> <li>• Presentation/discussion</li> <li>• Signed agreement (job description), including conflict of interest and ethics statements</li> </ul>   |
| <b>Board Operations</b>              | Help new board members understand how the board operates so that they may participate effectively.   | <ul style="list-style-type: none"> <li>• Board manual</li> <li>• Board mentors</li> <li>• Committee charges and member lists</li> <li>• Meeting schedule</li> </ul>   |
| <b>Board Members</b>                 | Facilitate new board member integration with other members.  | <ul style="list-style-type: none"> <li>• List of board members and biographical data</li> <li>• Time set aside for social interaction</li> </ul>  |
| <b>Skills</b>                        | Instruct new members on how to read a financial statement.   | <ul style="list-style-type: none"> <li>• Written materials</li> <li>• Presentation by the treasurer or finance committee</li> </ul>   |

Adapted from *The Board Building Cycle* by Hughes, Lakey & Bobowick, 2003