



BOARD ORIENTATION CHART

Program

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.

- Tour of facilities
- Observation of/participation in program activities
- Presentation by client, member, or program participant
- Video, slides, film presentation
- Verbal presentations
- Written program descriptions

Finances

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.

- Presentation by chief executive, chief financial officer, or treasurer
- Background materials (most recent audit, budget, financial), graphically presented, if possible
- Presentation of the fundraising strategy

History

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.

- Stories told by former board members or long-standing members (in person or on video)
- Pictures
- Written materials covering the basic facts of the organization, e.g., when it was founded and other major historical highlights

Strategic Direction

Present a framework for new members to participate effectively. Clarify the mission, vision, values, and goals that inform the organization's actions.

- Presentation/discussion by the chief executive or board chair
- Copy of strategic plan (or other documents, especially mission statement, if no plan is available)

Organizational Structure

Help new board members understand who does what and lines of accountability.

- Copy of the bylaws, IRS determination letter
- Organizational chart
- Introductions to key staff members

Board Roles

Ensure that new members understand the roles of the board.

- Presentation/discussion, preferably with the whole board involved
- Written materials, CD, video, and/or Web site

Board Member Responsibilities

Ensure that new board members understand their own responsibilities as board members.

- Presentation/discussion
- Signed agreement job description, including conflict-of-interest and ethics statements

Board Operations

Help new members understand how the board operates so that they may participate effectively.

- Board manual
- Board mentors
- Committee charges and member lists
- Meeting schedule

The Board as a Team

Facilitate new board member integration with other members.

- List of board members and biographical data
- Time set aside for social interaction

Skills

Instruct new members on how to read a financial statement.

- Written materials including a glossary of common financial terms and a description of the different documents that make up the organization's financials
- Presentation by the treasurer or finance committee

Source:

Lahey, Berit M. *The Board Building Cycle: Nine Steps to Finding, Recruiting, and Engaging Nonprofit Board Members*. Second edition. BoardSource 2007. Page 36-37.