

Orientation Chart

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

Information	Issues	Presentation Options
About the Organization		
Program	Inspire within new board members a passion and commitment for the outcomes of the organization – what it does, whom it serves, what difference it makes – Their passion will motivate their actions	<ul style="list-style-type: none"> • Talk to them about what is important in their lives and connect it to the mission. • Tour of facilities • Visits to the programs or if possible participation in program • Engage them in small setting to talk with client, member, or program participant • Video, slides, film presentation • Short presentations of recent stories/programs
Finances	Provide new board members with easy to read summaries of financial information – source of each channel of income, how it is spent, and the state of the organization’s financial health, including their role in fund-raising.	<ul style="list-style-type: none"> • Provide a short team presentation with the Executive Director, business manager (CFO) and Finance Chair for overview and questions • Provide financial history as well as current Background materials (recent audit, budget, financials), narrative and if possible - graphically presented, • Discuss and provide action plan of the fund-raising strategy
History	Root each member in an understanding of the history of the organization. Help each new board members see their own participation as part of the organization’s ongoing story.	<ul style="list-style-type: none"> • Story about the founders vision • Tales about start up challenges • Stories told by “old timers” and former clients • Pictures, scrape books • Written materials
Strategic Direction	Present a framework for the plan for the future so that new board members see their own participation as part of the organization’s ongoing story.	<ul style="list-style-type: none"> • Presentation/discussion by the executive director or board chair • Copy of strategic plan (or other documents, especially mission statement, if no plan is available)
Organizational Structure	Introduce the staff and talk about how the work really gets done in order to help new board members understand who does what and lines of accountability.	<ul style="list-style-type: none"> • Copy of the bylaws, IRS determination letter • Organization chart • Introduction to key staff members • Invite one staff member to each board meeting to give 10 minutes on what they do
Board Roles	Talk with new members to ensure that they understand the role of the board and can envision where they will fit in..	<ul style="list-style-type: none"> • Presentation/discussion, preferably with the whole board involved. • Written materials • One to one with President • Board Member Job Description and Agreement
Board Member Responsibilities	Ensure that new board members understand their own responsibilities as board members.	<ul style="list-style-type: none"> • Presentation/discussion • Signed agreement (job description), including conflict of interest and ethics statement.
Board Operations	Help new board members understand how the board operates so that they may participate effectively.	<ul style="list-style-type: none"> • Board manual • Board mentors • Committee charges and member lists • Meeting schedule
Board Members	Facilitate new board member integration with the other members.	<ul style="list-style-type: none"> • List of board members and biographical data • Time set aside for social interaction • A fun and quality Orientation
Skills	How to read a financial statement. Meeting and Voting processes	<ul style="list-style-type: none"> • Written materials, ByLaws • Presentation by the treasurer or finance committee