Sample Board Member Orientation Outline

*Meeting Format*

New directors need to feel like they’re an integral part of the board as soon as possible. If they don’t feel comfortable voicing their opinions, you’re all losing valuable input! Information is what will help everybody feel at ease. No matter how well-qualified your new board members are, it will take some time to get them up-to-speed and feeling comfortable as members of your team. But there are steps you can take to hurry this process along.  Conduct an orientation session for all new board members. Have them meet with staff and executive officers. Spend time going over background material about the organization and bring them up-to-date on the issues facing the board. Allow plenty of time for questions and answers. Try to cover these topics in a new board member briefing:

**Introduce Everyone**

* Elected Chair
* Executive Officers
* Committee Chairs and Members
* Other Board Members
* Staff
* Guests and Others

**Describe the Organization (Mission!)**

* Who we serve
* What we do
* Overview of programs
* Other

**Explain and Discuss**

* Meeting attendance requirements--both full board and committee
* Committee assignments and charges
* Board role and relation to administrator/staff
* Other
* Conduct Facilities Tour
* Administrative offices and board room

**Provide Documents Organized in a Manual**

* Mission statement
* Bylaws
* Policy Manual
* Minutes of board meetings for the past year
* Annual Report
* Audit Report
* Current Budget
* Current Financial Report
* Strategic Plan
* Goals for the year
* Rosters board members including addresses and telephone numbers
* List of Board Officers
* List of Committee Memberships including Chairs
* Annual Calendar of Activities and Meetings
* Copies of the Newsletter for the Year
* Other

**Collect Data at the Meeting**

* Addresses
* Telephone--home and office
* Fax number
* E-mail address
* Best time to contact
* Best time for meetings
* Other

These are ways to get board members comfortable with board responsibilities and meeting participation. Not only do the new directors start contributing right way during the meetings, they also develop a good working relationship with the veteran board members. Plan this meeting within the first month of the term of office. Waiting until the first or second quarter will only delay your board’s effectiveness.

Source:

*United Way of Minneapolis Area*
The Management Assistance Program for Nonprofits
2233 University Avenue West, Suite 360
St. Paul, Minnesota 55114
(612) 647-1216
and Carter McNamara, PhD