

BOARD ORIENTATION FORM

Orientation of: _____
(Board Member Name)

Date of Orientation: _____

Date Orientation Completed: _____

Introduce the Board Member to the Organization: _____

- Mission of organization
- Work of organization
- Other

Board Member Duties: _____

- Meeting attendance/board and committee
- The board's role versus the administration's role
- Serving on committees—what are they?

Give Tour of the Organization: _____

- Administrator's office, other offices
- Introduce to staff, volunteers, etc.

Board Member Information: _____

- Give board member copy of board handbook
- Go over board handbook with board member
- Go over minutes of previous board meeting and other meetings if they contain pertinent information
- Prepare and distribute a calendar of the year
 - a) listing dates of board meetings
 - b) listing dates of committee meetings
 - c) listing dates of fundraisers
 - d) listing other important information
- Give copies of current newsletter, plus back issues if available

Ensure Board Member Is Introduced to: _____

- President of the board (should be doing some of the orientation)
- Chairpersons of the various committees (who should extend an invitation for visiting the committee)
- Other board members

Be Sure to Collect the Following Information for the Board Member _____

- Current name, mailing address, home and work phone numbers
- Best time to contact
- Best times for him/her to make meetings
- Signed commitments to serve on the board, a confidentiality pledge and other items deemed necessary