

Board Member Orientation Checklist

Use this checklist to ensure new board members are onboarded smoothly and feel supported while they learn about their role and your organization.

Board Orientation Process:

- Special meeting for new board members orientation packet
- Onboarding interview (by phone or in person) with an experienced board member
- Three month check-in/review with board chair or another experienced board member

Board Orientation Meeting:

- Introductions among new and experienced board members
- Formal introduction of new board members by the nominating committee
- Brief presentations by experienced board members explaining board role and procedures
- Brief presentation by staff about scope of the organization's mission and programs or services
- Structured opportunity for small group discussion by interest areas (i.e. financial, personnel, programs, planning, fundraising)
- Clear statement of expectations of board members, including role in agency fundraising
- Opportunity for questions from new board members

Onboarding Interview with Experienced Board Member:

- Discussion of new board member preferences for committee assignment
- Explanation of upcoming significant board decisions or events
- Commitment to provide personal introductions to board members with common interests
- Opportunity for new board member to ask questions and share feedback

Three month Check-in:

- Inquiry into involvement with committees
- Request for feedback in orientation process
- Opportunity for new board member to ask questions and share feedback