



# Boards in Gear: Board Orientation Checklist

Sourced from Technical Assistance for Community Services (2004) and adapted into the following worksheet, the Board Orientation Checklist provides a solid starting place for developing your nonprofit’s own orientation process. Review each of the checklist items, mark whether this is something your board currently does, and capture any notes or next steps in the space provided.

**Note:** More information is available in Chapter 3. Composition & Development.

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Orientation Actions	Included in your orientation?	Notes & Next Steps
<b>General – Board Orientation Process</b>		
New Board members receive written notice of their selection to the board stating dates their term begins and ends, regular meeting dates, times, places, and information about the board orientation process	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Special meeting for new board members	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Orientation packet	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Personal phone call or meeting with an experienced board member	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Follow-up personal contact after the first three months of board service	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>Board Orientation Packet</b>		
Statement of purpose or mission (if developed and adopted by the board)	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Brief overview of organization programs and services	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Orientation Actions	Included in your orientation?	Notes & Next Steps
Organization annual report with financial statements for the past fiscal year	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Up-to-date copy of the bylaws	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Personnel policies in brief, or brief overview of personnel system for larger organization including: staff organization chart, number of professional and non-professional staff, identification of any unions or employee bargaining associations, date of last major revision of personnel policies	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Policy statement and procedures formally adopted by the board	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Abbreviations and acronyms of agencies and programs with which the organization is connected	<input type="checkbox"/> Yes <input type="checkbox"/> No	
List of all board members' names, addresses, phone numbers, and terms of office	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Committees: <ul style="list-style-type: none"> <li>• List of committees with chairperson identified</li> <li>• If committees have regular meeting times and places, these are included</li> <li>• Board organization chart showing committee and sub-committee structure</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Most recent financial statements and current annual budget	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Minutes for most recent board meeting	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Orientation Actions	Included in your orientation?	Notes & Next Steps
Listing of facilities owned or rented by the organization for operations, including address, staff member in charge, and general purpose of the facility	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>Board Orientation Meeting</b>		
Opportunity for personal introductions among new and experienced board members	<input type="checkbox"/> Yes <input type="checkbox"/> No	
More formal introductions of new board members by the selection committee highlight new board members' background, skills, and experiences	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Brief presentations by experienced board members explaining board role and procedures	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Brief presentation by staff about scope of organization's services	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Structured opportunity for small group discussion by interest areas (i.e., financial, personnel, programs, planning, fundraising)	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Clear statement of board member expectations including role in organization fundraising	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Open-ended opportunity for questions from new board members	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>Personal Contact with Experienced Board Member</b>		
Discussion of new board member preferences for committee assignment	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Brief explanation on upcoming significant board decisions or events	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Orientation Actions	Included in your orientation?	Notes & Next Steps
Specific commitment to greet the new board member at the next board meeting and provide personal introductions to board members with common interests	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>Follow-Up Contact after Three Months of Service</b>		
Opportunity for general comments about board service so far	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Inquiry into involvement with committees if no involvement yet; discussion of barriers and problem solving	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Request for feedback on orientation process	<input type="checkbox"/> Yes <input type="checkbox"/> No	