



Orientation/Training Process for New Board Members

1. As soon as it is clear an individual is joining the Board, the new Board Member receives informational materials in the form of a Board of Director's Manual which includes the following:
 - ◆ History and Philosophy of the organization, Vision & Mission Statements
 - ◆ By-laws
 - ◆ Board Roster (complete information – affiliations, positions, addresses, phone numbers, FAX, committee assignments, Board offices held, etc.)
 - ◆ Bios on Board Members (optional)
 - ◆ Organizational Charts
 - ◆ Job Descriptions for Board Members & Board Leadership
 - ◆ Board Meeting Schedule
 - ◆ Standing Committee Descriptions
 - ◆ Current Annual Operating Plan
 - ◆ Long-Range/Strategic Plan
 - ◆ Current Annual Operating Budget
 - ◆ Most Recent Audit Report and 990
 - ◆ Policies of the Board
2. After reviewing these materials independently, the new Board Member receives an orientation briefing paralleling the materials and conducted by the Board Chair and/or the Executive Director. This can be done individually or in a group. Considerable time is spent in this meeting discussing questions the new Board Member may have. The new Board member also selects the standing committee on which he or she will serve.
3. The new Board Member may meet individually with the committee members on which he or she has elected to serve in order to become oriented to the committee's current work agenda, issues and challenges.
4. The Executive Director and another Board Member may take the new Board Member to visit a project site, attend a performance, exhibit or otherwise personally view the work of the organization.
5. The Board Chair talks individually with the new Board Member after the first Board Meeting attended by the new member to clarify any issues that may need to be addressed.
6. Ongoing board development takes place as a minimum annually and whenever opportunities present themselves. Monthly Board meetings will contain a short training each month.