

New Board Member Orientation Plan

Your organization benefits greatly in providing an orientation session for new board members. This effort enables the board to harness its new members' productivity as quickly as possible, while the members themselves feel welcomed and valued. Following is a sample meeting agenda and list of materials as a start.

Board Orientation Session Elements

- Review the mission, vision, and values of the school. Recount the founding of the school. Update progress on strategic goals or initiatives.
- Discuss the roles and responsibilities of the board, distribute the annual board meeting schedule, and share a committee list or committee descriptions. If the committee selection is already determined for the new board member, the committee chair can present information about the committee and answer questions.
- Share the external environment in which the charter school operates—including authorizing, political, and economic forces—and if there are larger trends that can impact the charter school.
- Schedule a school tour for each incoming board member to familiarize them with the school site and introduce them to key administrative staff like the principal.

Your Board Chair or Governance committee should check in with new members within 3 months of the orientation to ensure that they are clear on the board governance process and to elicit any concerns or suggestions.

List of Materials:

- Executive Summary of Charter Application
- Bylaws
- Annual Board Meeting Schedule
- Board Roles and Responsibilities and Committee Descriptions
- Board Member contacts (and bios or resumes)
- Latest Budget/Financials
- Agenda and Minutes from the last board meeting
- Organizational Chart

XYZ Public Charter School
Sample New Board Member Orientation
Time, Location
Agenda

Topic	Presenter	Time
School History, Mission, Vision	Founder/Board Member	10 min
Board Overview <ul style="list-style-type: none"> ○ Roles and responsibilities of the Board ○ Strategic planning overview ○ Potential Committees ○ Board giving 	Board President Committee Chairs	20 min
External Environment -Charters in MD/district	Executive Director/Board Member	10 min
School Tour	Executive Director/Principal	20 min