

Board Orientation Binder Contents List

Introduction to the Organization

- Mission, Vision, Values page
- Welcome letter from the Executive Director/President & CEO
- Welcome letter from the current Board President/Chair
- Brief history of the organization. This should be inspirational and focused on your organization's impact.
- Information about your cause including infographics, recent articles, last year's impact report.
- Contact sheet for leadership and key employees

Introduction to Board Members

- Contact list for all board members and committee members including name, physical address, email address, and phone.
- For extra credit, create mini-bio pages for each board member including a photo. You probably already have this available on your website.

Important Dates

- Upcoming board and committee meetings
- Upcoming programmatic and development related events
- Any upcoming educational opportunities (like this seminar!)
- Previous board agendas & minutes for the last 3 meetings

Introduction to Board Service

- Resource: Introduction to Serving on a Nonprofit Board
- Robert's Rules of Order – a [brief history](#)
- Board member job descriptions
- List of board committees. Include the chair and members.
- Board Agreement (signed)
- Board Conflict of Interest Policy and Form to identify any conflicts
- A copy of your organization's D&O insurance certificate

Organization's Financials

- Financial policy
- Approved budget for the current calendar year
- Most recent monthly financials
- Most recent audited financial statement
- Copy of the past 3 years' Form 990's and schedules

Public Relations & Marketing

- A copy of current marketing materials such as brochures, flyers, one-pagers, etc.
- Recent newsletters
- Most recent annual impact report
- Executive Summary of the current Strategic Plan or a Vision Document (or any strategic planning document if available)
- List of social media channels

Fundraising

- Contact Sheet
- Fundraising one-pager
- Give/Get Agreement
- Board Annual Fundraising Plan
- Thank you letter/email template
- Phone call script (this could be your elevator pitch)
- Blank notecards and envelopes they can use

Other resources as determined by your organization (examples)

- Infographic outlining a dog's training timeline
- Login information to your state's nonprofit association. Many offer free accounts under yours for board members
- Social media handles or hashtags they can use to tag the org
- Donation pledge cards