

Items Often Found in Board Orientation Packets

- The articles of incorporation and bylaws;
- Any other governing documents (might include summaries of requirements of grants or government funding that substantially affect operations);
- The board job description or service agreement;
- A basic overview of the legal roles and responsibilities of nonprofit board members (like the one produced by the Oregon Attorney General's office - or use my summary in resources on the website);
- A brief overview of how the board functions (roles, decision-making process) if that is not part of the board job description;
- A list of all current board members and their background and positions;
- A list of all staff and their positions;
- A one page overview of the mission and history of the organization;
- Most recent annual report or some other summary of the current position of the organization;
- Minutes from the most recent board meeting (and executive committee meeting, if an EC exists);
- The adopted budget for the year;
- The most recent financial statement, and last year's end-of-year financial statement (might be part of annual report);
- A story-based overview of who the organization is serving/ what difference it makes (again, might be part of the annual report);
- Brochures or other descriptive materials about the organization and/or its programs;
- A recent newsletter; and,
- Basic information (brochures, etc.) about any major partners.

Many of these items, once created, can also be used for recruiting new board members, for recruiting or orienting new staff, for meetings with funders, etc.