

The following is an overview of the information that needs to be conveyed to new board members at their orientation. The materials can be presented in person and in writing at an orientation meeting. Much of this is included in “Presenting: CCE Board Orientation” a Power Point presentation.

Board Orientation

Key * from Initial Contents for Board Members

Information	Issues	Presentation Options
About the Organization		
Program	Offer new board members a feel for the work of the organization – the program philosophy – what it does, whom it serves, what difference it makes – to get them emotionally and intellectually connected and motivated.	<ul style="list-style-type: none"> • Tour of facilities • Observation of/participation in program activities • Presentation by client, member or program participant • Video, slides, film presentation • Verbal presentations • Written materials* • Compressed video conference with Cornell resources
Finances	<p>Help new board members become informed about where money comes from, how it is spent, and the state of the organization’s financial health, including their role in fund-raising.</p> <p>How to read a financial statement.</p>	<ul style="list-style-type: none"> • Presentation by executive director, chief financial officer or treasurer • Background materials (most recent audit, budget, financials, Co. Law 224*), graphically presented, if possible • Presentation of fund-raising strategy • Written materials • Presentation by the treasurer or finance committee or by resource at CU via compressed video
History	Provide sufficient knowledge about the past so that the present makes sense. Also help new board members see their own participation as part of the organization’s ongoing story.	<ul style="list-style-type: none"> • Stories told by “old timers” • Pictures • Cornell Cooperative Extension: A History of Commitment to the People of New York State
Strategic Direction	Present a framework for new members to participate effectively. Clarify the mission, vision, organizational values and their implementation, and goals that inform organizational actions.	<ul style="list-style-type: none"> • Presentation/discussion by the executive director or board chair • Copy of strategic plan* (or other documents, especially mission statement, if no plan is available)
Organizational Structure	Help new board members understand who does what and lines of accountability.	<ul style="list-style-type: none"> • Memorandum of Agreement* • Copy of the constitution*, IRS determination letter* • Organizational chart • Introductions to key staff members

Information	Issues	Presentation Options
About the Board		
Board Roles	Ensure that new members understand the roles of the board.	<ul style="list-style-type: none"> • Presentation/discussion, preferably with the whole board involved • Written materials • Ten Responsibilities of a CCE Board*
Major Board Responsibilities	Ensure that new board members understand their own responsibilities as board members.	<ul style="list-style-type: none"> • Presentation/discussion • Signed agreement (job description), including conflict of interest and ethics statements
Board Operations	Help new board members understand how the board operates so that they may participate effectively.	<ul style="list-style-type: none"> • Board Handbook • Committee charges and member lists • Meeting schedule*
Board Members	Facilitate new board member integration with the other members.	<ul style="list-style-type: none"> • List of board members and biographical data • Time set aside for social interaction • Board mentors