



**Mission
Guardian**

Healthy Nonprofit Homework

Board Recruitment & Onboarding

Want to listen along? I'll walk you through every step. [Listen along on Soundcloud.](#)

**How often do board members receive training and information about their responsibilities?
(check all that apply)**

- ☐ Once, when they first start
- ☐ Every year
- ☐ If there's a problem and it seems necessary
- ☐ What's a board training?

Board training (and refresher trainings) are an important part of good volunteer management. Treat board members like they are your most valuable volunteers and train them well. Past service on the board or on other boards doesn't mean that board members should be exempt from training – often it means they need it more than the new person who is trying hard to learn about their responsibilities.

1. New board members receive an orientation to the organization.

Yes → Woot woot! 😊

No → 😞 Uh oh! Board member training is important, there are lots of great resources and we also offer training sessions from the flat fee menu.

2. As part of new board member orientation, new board members receive a copy of the organization's (check all that apply)

- ☐ mission / vision statements
- ☐ articles & bylaws
- ☐ internal policies & procedures
- ☐ past meeting minutes for at least the last 3 meetings
- ☐ information about their roles and legal responsibilities
- ☐ last 3 years of year-end financial statements or filed 990s

Checked all the boxes? Great!

If you missed one or more...

Remember: getting new board members up to speed and educated about the organization helps them quickly get acclimated and understand more about the inner workings of the organization. When board members don't have access to information it is hard for them to fulfill their fiduciary duties well. Make sure you have a new board member welcome packet that includes these items. Check out the Fiduciary Duties info sheet on the portal.

3. Do the board members have a written job description that outlines their expected performance and responsibilities?

Yes Woot woot! 😊

No ➡️ 😞

4. Do board Officer roles have a job description or a written description of their performance expectations and responsibilities? (President, Treasurer, Secretary, Vice-President etc.)

Yes ➡️ 👍

No ➡️ 😞 (Check out the how to write a great job description article and sample description on the member portal)

5. Does the organization have new board members sign a conflicts of interest policy and fill out a disclosure each year?

Yes ➡️ 👍

No ➡️ 😞 (Check out the portal to see the conflicts of interest policy and annual disclosure form there for you)

[Visit the member portal to download resources or to schedule a consult!](#)