

New Board Member Orientation Check List



Pre-Orientation and Onboarding Check List

Immediately Following Election

Complete Background Check after board members are elected and prior to extending the invitation to New Board Member Orientation. Record background date in their Pinwheel profile.

Two Weeks Before Orientation

#1 Add and Tag New Board Member to Pinwheel

- Council directors are responsible for updating and adding all staff and board members to their Pinwheel account.
- Once added to Pinwheel, board members will automatically receive the Boardroom Newsletter, released 3x per year
- Board members will automatically be created as users in GLA once they are created in Pinwheel. [Click here](#) for instructions on how to add staff and board to Pinwheel.
 - Once a new board member is added and tagged as a board member (see instructions above), then, within 24 hours, they will automatically receive a curriculum called [Girls on the Run Staff and Volunteer Orientation](#), which is approximately 6 hours. This orientation includes Good to GOTR (GTG) and GOTR Need to Know (GNTK). Please follow up with new board members to ensure the curriculum is assigned automatically. If it is not, please email techsupport@girlsontherun.org for assistance.
 - **Note:** If the new board member is currently/previously a GOTR coach, please email techsupport@girlsontherun.org to ensure GTG/GNTK is assigned properly as they may have already completed this curriculum as a coach. If they were previously a coach, the addition of their names to the Pinwheel Board Tab alone will not trigger this assignment in every case.

The assigned curriculum includes two sections:

Good-to-GOTR: New to Girls on the Run provides a broad overview of Girls on the Run, essential expectations and empowering resources and information critical to a successful transition into Girls on the Run. The objective of this section is to give learners a comprehensive orientation to our organization including but not limited to history, culture, operations, mission sustainability, programming and understanding your role at Girls on the Run.

GOTR Need-to-Know is the next step in the orientation process, after completion of Good-to-GOTR: New to Girls on the Run. New staff and board members will complete a series of self-paced virtual trainings and review policies designed to familiarize them with the organization's



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key initiatives, latest resources available from Girls on the Run HQ and to become informed of the overall health and vision of the organization.

Determine if you would like the new board member to watch these orientation webinars prior to the orientation or with a certain time frame (ex: 30 days) and communicate this process to the new board member(s).

#2 Fill out [Incoming Staff Form](#) and select 'Board Member' (**As Needed**)

- Determine if this new board member will need a @gotr email to access other platforms such as Podio, NetSuite, or the Council Portal. *Council directors do not need to submit this form for board members unless they need any of the above access.*

#3: Board Chair, Council Director or Board Buddy/Mentor Calls New Board Member

"So excited to have you join the board! Be on the lookout for a carefully curated e-packet of materials to prepare you for your orientation on [date, time, location]." (Be sure to mention Good to GOTR and GOTR Need to Know if that is expected to be watched prior to the orientation).

One Week Before Orientation

#1: E-Packet Sent to Board Member with...

- A welcome letter
 - Letter should also include the date, time and location for the orientation session.
- Current year budget
 - Optional: Bar graph showing the status of revenue (contributed and earned) for the past 5 years
- Current strategic plan
 - Optional: Executive summary of the plan (1-2 pages max)
- Bio book of the board — ideally personal bios written by board members and picture (does not need to be a professional headshot)
 - Include fun facts about board members and your "GOTR why"

60-75 Minute Orientation Session Agenda

Board Member Binder: Give each board member a hard copy and/or link to online organized folder (much of the content will be covered during the Orientation PowerPoint – call out anything additional that you want to cover)

Introduction of attendees (10 mins):



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- Board chair, council director, other board representatives supporting, and new board members (fun activity: create and share GOTR name)

Inspiration (15 mins):

- [GOTRI video](#), a video from a GOTR practice, a compelling impact story
- Share your “GOTR why”

PowerPoint Presentation (30 mins):

Check out the New Board Member Orientation Template PowerPoint, easily adaptable for your council to personalize. This presentation includes:

- Mission, Vision, Core Values
- National Movement: What We Do, What Sets Us Apart, National Numbers
- History: Local Impact
- GOTRI Strategic Map and Mission Advancement Markers
- GOTR **[Council]** Strategic Plan: High level goals for the year
- Budget Review: Earned and contributed income, priorities for the year, historical trends
- Board Member Upcoming Need to Know
 - **Review Board Binder, Board Meeting Calendar & Business:** Call out contents of board binder, note the dates of board meetings, time and location for each board meeting
 - **Review Event Calendar:** Share details about any events (5K, Sneaker Soiree, LUNAFEST, etc.) and board member expectations to attend or engage.
 - **Review Board Meeting Agenda:** The board chair explains (briefly) the backstory behind each agenda item.
- Board Member What to Expect Next:
 - **Engagement/Ongoing Support:** Board Buddies, engagement opportunities (ie: site visits, coach training, events, etc.), board member check-ins, etc.
 - **Committees:** Review committees and next steps to connect with committee chairs
- Board Member Essential Docs:
 - Board Agreement and Commitment, Non-Compete

Closing/Reflection: ED and board chair share a picture of what successful board service looks like and new board members offer a preliminary look at what they hope to gain, what they are most excited about and still curious about, and what they hope to accomplish during their term.

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TIP #1 What are we NOT covering in detail at the orientation?

- **Expectations:** This should be covered in detail and transparency during the interview process and the document is signed at the orientation
- **Commitment:** This should be covered in detail and transparency during the interview process and the document is signed at the orientation
- **By-laws:** Point to the bylaws in the binder and ask all board members to review. Call out anything that you want to highlight (ie: voting, terms, etc.)

***Note:** ensure the council has a plan to store and manage board member documents (ie: shared google folder, filing system at office, etc.)*

First Board Meeting with New Board Member Cohort - Agenda

#1: Create a Sense of Belonging

- Every board meeting in which a new member attends should begin with an exercise that gives the group an opportunity to get to know one another.
 - Example: Each person speaks about which core value connects with them and why. Each story should be 2 minutes maximum, and folks should be prepped ahead.
- During the Meeting: Be Mindful of New Member Lack of Detailed Knowledge AND Engage
 - When possible, an aside from the chair or council director to clue new board members in can help new members feel included. Be mindful that there are places where a new voice will be of great value.

Post Orientation

- **Thank You Note from the Board Chair:** Show appreciation, details about the next meeting time, a link to the folder with all the materials board members will need to succeed, any follow-up steps about committees, any reminders about Good to GOTR or GOTR Need to Know, or other board trainings, etc.