

Nonprofit Director Onboarding Checklist

A practical onboarding and orientation checklist for charitable nonprofit boards and incoming directors.

This checklist is designed to be shared with prospective or newly elected directors. It highlights core governance expectations, common onboarding steps, and basic compliance topics that directors should understand early in their term.

Who this is for: Board chairs, governance committees, executive directors, founders, and incoming directors of nonprofit corporations (including organizations applying for or operating as 501(c)(3) public charities).

How to use it: Use this as a structured agenda for onboarding, and as a document checklist for a board portal or board binder.

1. Set up a structured onboarding process

- Schedule a director orientation within the first 30 days.
- Assign an onboarding lead (board chair, governance committee, or designated director).
- Provide a simple timeline: what happens in week 1, month 1, and the first 90 days.
- Confirm logistics: meeting cadence, committee expectations, and communications norms.

2. Provide a board manual or director handbook

- Include the mission and a plain-language description of programs and impact.
- Explain how the board is organized (committees, officers, voting, quorum).
- Include key governance policies (conflicts, whistleblower, document retention, etc.).
- Add a glossary of common terms and acronyms used by the organization.

3. Hold an onboarding meeting (and follow-up as needed)

- Introduce board members and key staff; clarify the board-staff relationship.
- Walk through board procedures: agendas, minutes, approvals, remote attendance.
- Review current priorities, upcoming votes, major risks, and key deadlines.
- Discuss culture and expectations: confidentiality, preparation, and respectful deliberation.

4. Assign a mentor for the first 6-12 months

- Pair each new director with an experienced director for ongoing support.
- Encourage pre-meeting check-ins to review agenda items and background materials.
- Debrief after meetings to clarify context, stakeholders, and follow-ups.
- Identify where the new director's skills can add value (committee work, introductions, special projects).

5. Build understanding of the mission, history, and programs

- Provide the mission and vision (if used), a short organizational history, and the current strategic priorities.
- Explain each program: who it serves, how it operates, how it is funded, and how outcomes are measured.
- Offer a site visit or program observation when feasible.
- Share known program challenges (funding, staffing, compliance) so oversight is realistic.

6. Explain the board's oversight role in plain language

- Strategy and policy: setting priorities and adopting core organizational policies.
- Compliance: ensuring the organization follows law and its governing documents.
- Financial stewardship: budgets, reporting, audits, and internal controls.
- Leadership oversight: evaluating the executive director and reviewing compensation decisions.
- Major decisions: approving significant transactions, contracts, and organizational changes.

7. Clarify internal expectations

- Attendance expectations and acceptable remote attendance methods.
- Committee participation expectations and time commitments.
- Confidentiality expectations and handling of sensitive information.
- Fundraising expectations (including any give-or-get expectations, if applicable).
- Public representation and communications expectations.

8. Cover basic fiduciary duties and core compliance topics

Directors typically have fiduciary duties under state law. While exact standards vary by state, they are often summarized as duty of care, duty of loyalty, and duty of obedience (mission alignment). New directors should also understand the organization's most common compliance exposure areas.

- Conflicts of interest: disclosure, recusal where required, and documented approvals.
- Tax-exempt compliance basics: private inurement, prohibited private benefit concerns, and required annual filings (e.g., Form 990 series).
- Fundraising compliance basics: state registration and solicitation disclosures where applicable.
- Privacy and data security expectations when handling donor or constituent information.
- Insurance basics: directors and officers (D&O;) coverage and incident reporting procedures.

9. Provide a concrete financial oversight snapshot

- Current budget, major revenue sources, and major expense categories.

- Cash flow and reserves (if any), and any known liquidity constraints.
- Internal controls: spending approvals, check-signing authority, and segregation of duties.
- Audit or financial review status and any material findings (if applicable).
- Status of key filings: federal information returns, payroll filings, state charity filings, and renewals.

10. Provide secure access to essential documents

Use a board portal or a director-only shared folder. Maintain version control and restrict access to current directors.

- **Governance:** Certificate of incorporation and amendments; bylaws and amendments; board policies (conflict of interest, whistleblower, document retention); committee charters (if any).
- **Board operations:** Board roster and committee roster; meeting calendar; recent minutes and agendas; director role description.
- **Programs and operations:** Program summaries; strategic plan (if any); key communications materials; organizational chart.
- **Financial and compliance:** IRS determination letter (if applicable); most recent Form 990 series filing; audited financials (if any); current budget; state registrations and renewal status (if applicable); D&O; insurance information.

Accessibility and alternative formats

This checklist is intended to be accessible to the widest possible audience. If you experience difficulty accessing any content or need this checklist in an alternative format, please contact the office for assistance.

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