

Board Member Orientation Checklist

Name of Board Member: _____

Address _____

Telephone--home and office _____ Best time to contact _____

Date orientation began: _____

Orientation completed by: _____ (person and date)

Describe The Organization To The Board Member: _____

Who we serve

What we do

Other:

Explain And Discuss With Board Member: _____

Meeting attendance--both full board and committee

Committee assignment

Board role and relation to administrator/staff

Other:

Conduct Tours: _____

Administrative offices and board room

Other facilities:

Deliver Important Information To Board Member: _____

Letter of welcome from the chairperson and administrator

Mission statement

Bylaws

Board policies

Copies of the minutes of board meetings for the past year

Annual report and auditor's report for last three years

Current budget and other financial reports

Long-range plan

Goals for the year

List of all board members including addresses and telephone numbers

List of board officers

List of committee memberships including committee chairpersons

Calendar of meetings for the year

Copies of the organization newsletter for the past year

Other:

Introduce Board Member To: _____

Chairperson

Other board members

Staff

Others: