Board Orientation Checklist

New Board members receive written notice of their election to the Board stating dates the term begins and ends, regular meeting dates, times, places, and information about the Board orientation program.

Board orientation program:

1) Orientation packet
2) Personal phone call or meeting with an experienced Board member.
3) Follow-up personal contact after first three months of Board service.

1. Board orientation packet includes:
   a.) Statement of Purpose or Mission (if developed and adopted by Board)
   b.) Brief overview current efforts and activities
   c.) Annual Report with financial statement for past fiscal year
   d.) By-laws
   e.) Policy Statements and Procedures which have been formally adopted by the Board
   f.) Alphabet Soup: Glossary of abbreviations and acronyms used to refer to agencies and programs with which this organization is connected
   g.) List of all Board members' names, addresses, phone numbers, and terms of office
   h.) List of committees with chairperson identified
      If committees have regular meeting times and places, these are included.
      Board organization chart showing committee and subcommittee structure.
   i.) Most recent financial statements and current annual budget
   j.) Minutes for most recent Board meeting

2. Personal contact with experienced Board member includes:
   a.) Discussion of new Board member interests and skills
   b.) Brief explanation of upcoming significant Board decisions or events
   c.) Specific commitment to provide personal introduction to Board members with common interests

3. Follow-up contact after three months service includes:
   a.) Opportunity for general comments about Board service so far
   b.) Inquiry into involvement with committees, if no involvement yet, discussion of barriers and problem solving
   c.) Request for feedback on orientation process