

Board Member Orientation Checklist

BOARD MEMBER NAME:	ORIENTATION DATE:	DATE COMPLETED
1 Introduce the board member to the organization: <input type="checkbox"/> Outline the mission of organization <input type="checkbox"/> Explain the role of the organization <input type="checkbox"/> Other		
2 Outline board member roles and responsibilities: <input type="checkbox"/> The board’s role versus the administration’s role <input type="checkbox"/> Board committees—what are they? <input type="checkbox"/> Attendance at both board and committee meetings		
3 Give a tour of the organization: <input type="checkbox"/> Director’s office, other offices, meeting rooms <input type="checkbox"/> Introduction to staff, volunteers, etc.		
4 Supply board member information: <input type="checkbox"/> Give copy of board handbook <input type="checkbox"/> Review board handbook with board member <input type="checkbox"/> Review minutes of previous board meeting (and other meetings if they contain pertinent information) <input type="checkbox"/> Prepare and distribute a calendar that includes: <ul style="list-style-type: none"> ▪ Dates of board meetings ▪ Dates of committee meetings ▪ Dates of fundraisers ▪ Other important dates <input type="checkbox"/> Give copy of current newsletter, plus back issues if available		
5 Introduce board member to the following people: <input type="checkbox"/> President of the board (who should do some of the orientation) <input type="checkbox"/> Chairpersons of board committees (who should extend an invitation to visit their committees) <input type="checkbox"/> Other board members		
6 Collect the following information from the board member: <input type="checkbox"/> Current name, mailing address, home and work phone numbers <input type="checkbox"/> Best time to contact them <input type="checkbox"/> Best times for them to attend meetings <input type="checkbox"/> Signed commitment to serve on the board <input type="checkbox"/> Signed confidentiality pledge <input type="checkbox"/> Other items deemed necessary		