

**Board Orientation Checklist**

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|  | **With Board chair, CEO, and key staff** |
|  | * **Tour facilities and introduction to key staff/programs**
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|  | * **Overview of website and social media**
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|  | * **Discussion with Board chair re role of the board and individual board member responsibilities**
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|  | * **Discuss fundraising process, trends, plans, expectations of board members**
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|  | **Put in a binder/drop box/board member portal and review:** |
|  | * **Mission, Vision, Values**
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|  | * **Current Strategic Plan**
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|  | * **Press Clippings**
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|  | * **Annual calendar of meetings and events**
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|  | * **Table of organization with names**
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|  | * **Board roster with terms**
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|  | * **Board member job description**
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|  | * **Committee list and members**
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|  | * **Articles of Incorporation, IRS determination letter, current By Laws/Code of Regulations**
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|  | * **Certificate of Insurance for D&O insurance**
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|  | * **Most recent audit and IRS 990**
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|  | * **Most recent financial statements**
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|  | * **Current budget**
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