Logo, company name

Description automatically generated

**Board Orientation Checklist**

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