

BOARD ORIENTATION

CHECKLIST

HISTORY

TO DO:

- Ensure that new board members understand the history of the organization. When was it founded? Why? How has it grown and developed over time?

TO DELIVER:

- Brief written or video history or fact sheet
- Hard copy marketing materials, if available
- Articles of Incorporation

STRATEGIC DIRECTION

TO DO

- Review strategic direction.

TO DELIVER:

- Strategic plan or documents showing strategic direction (this can be done verbally if there is not a written document in place)

PROGRAMS/SERVICES

TO DO:

- Arrange for a tour of the facilities.
- Showcase programs and services in person or virtually, as appropriate.

TO DELIVER:

- Organization's website address and social media handles as well as key talking points or organization data
- Annual calendar of events
- List of programs/services
- Links to recent press

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FINANCE

TO DO:

- Review recent financials and teach board members how to read and understand organizational financial statements.
- Provide an overview of the budget practices board members will need to know, including what to know to approve organizational budgets, what the Form 990 is, and how to read a financial statement.

TO DELIVER:

- Most recent audited financial statements
- Last two Form 990s
- Approved calendar/fiscal year operating budget
- Directors and Officers insurance policy overview

ORGANIZATIONAL & BOARD STRUCTURE

TO DO:

- Review bylaws.
- Review standing or ad hoc committee structure and committee charters.
- Review organizational chart and introduce key staff members.
- Make sure board members not only understand how the organization is structured, but also how the board interacts with specific departments and staff members.

TO DELIVER:

- List of staff positions and/or organizational chart
- Bylaws
- Board Roster
- Committee Structure (Members, Charter/Purpose)



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