

Board Orientation Checklist

General Information	
By laws	
Organizational Chart and staff structure	
Board Structure	
Vision and Mission	
History of the Organization	
Strategic Plan – Strategic priorities, goals and objectives	
Summary of all programs and services	
List of board members	
Roles and Responsibilities	
Board Member Job Description	
Officers Roles	
Chief Executive Role	
Staff Roles	
Committees and their role, job description	
Expectation of new board members	
List of annual events board expected to attend	
Policies and Procedures	
Board policies and procedures – provide and review	
Board culture – overview of how board works	
Financial Management	
Budget Process	
Copy of current year budget	
Audit and/or annual report	
Current financial statement - review	
Other Information	
Minutes of board meetings (3 to 6)	
Tour of facility and offices	
Brochures and PR materials	
Board Agreement to Sign	
Confidentiality, Conflict of Interest to sign	
Fundraising	
Contribution Expected	
Summary of Fundraising activities for ABC	
Board Role in Fundraising – define expectations and events to participate	