

Attachment G

Sample Board Member Orientation Checklist

Please initial and date each item as it is reviewed.

Name: _____

Date: _____

	Date	Initials
Who We Serve	_____	_____
Review Mission	_____	_____
Annual Report	_____	_____
What We Do	_____	_____
Program Description(s)	_____	_____
Program Evaluation	_____	_____
Current Strategic Plan	_____	_____
Goals for the Year	_____	_____
Tours	_____	_____
Office Tour	_____	_____
Tour Other Facilities	_____	_____
Parking	_____	_____
Board Member Responsibilities	_____	_____
Position Description/Expectations for Board Members	_____	_____
Attendance	_____	_____
Attendance by Conference Call	_____	_____
Online Meetings	_____	_____
Relationship/Interaction with Executive Director/Staff	_____	_____
Expectations for Fundraising	_____	_____
Review of Other Key Documents:	_____	_____
Bylaws	_____	_____
Board Policies	_____	_____
Copies of previous year's board minutes	_____	_____
<i>Standards for Excellence®: An Ethics and Accountability</i>	_____	_____
<i>Code for the Nonprofit Sector</i>	_____	_____
Review of how to read financial statements	_____	_____
Current Budget and interim financial reports	_____	_____
Leadership of Organization	_____	_____
Board member contact sheet	_____	_____
List of officers	_____	_____
List of committees (including memberships and leadership)	_____	_____
Introductions	_____	_____
Chairperson	_____	_____
Committee Chairs	_____	_____
Other Board Members	_____	_____
Key Staff	_____	_____
Key Volunteers and Stakeholders	_____	_____
Meeting Dates for the year	_____	_____

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