



## Board Member Orientation Checklist

Whether nonprofit or corporate, public, private, or advisory, every board should take the responsibility to formally orient new members to its procedures and parent organization. Following is a sample checklist – an overview of what you’ll need to become familiar with during your first three months as a new board member.

Program	Date Completed
Tour of the organization’s facilities	___/___/___
Attending program presentation by CEO or key board member	___/___/___
Review of written program materials	___/___/___

  

Finances	Date Completed
Attending presentation by CFO or treasurer	___/___/___
Review of recent financials	___/___/___
Explanation on how to read and understand financial statements	___/___/___

  

Board History	Date Completed
Read written materials about the board	___/___/___
Check related websites and look for any news/media coverage	___/___/___

  

Strategic Direction	Date Completed
Receive and review strategic plan	___/___/___

  

Organizational Structure	Date Completed
Review of bylaws	___/___/___
Review of organizational chart	___/___/___
Introduction to key board members and staff	___/___/___

  

Board Roles	Date Completed
Review of written board materials	___/___/___
Discussion with board chair or entire board	___/___/___

Board Member Responsibilities	Date Completed
Review and signing of letter of agreement	____/____/____
Review and signing of conflict-of-interest policy	____/____/____

Board Operations	Date Completed
Receipt and review of board manual	____/____/____
Meeting with board chair	____/____/____
Accepting committee or task force assignment	____/____/____
Attending first board meeting as a new board member	____/____/____