

## Board Orientation Check List

General Information	Have	Update	Need
By laws			
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			
Committees and their role, job description			
Expectation of new board members			
List of annual events board expected to participate in			
Policies and Procedures			
Board policies and procedures			
Board culture – overview of how the board works			
Financial Management			
Budget Process			
Copy of current year budget			
Audit and/or annual report			
Current financial statement			
Other Information			
Minutes of board meetings (3 to 6 months)			
Confidentiality, Conflict of Interest to sign			
Fundraising			
Contribution Expected			
Summary of Fundraising activities			
Board Role– define expectations and event participation			