I3 Digital
GULF COAST COMMUNITY FOUNDATION

Board Orientation Checklist

- **TOUR** facility.
- **INTRODUCE** to staff and specifically to administrative assistant assigned to board communications.
- **REVIEW BOARD MANUAL/PORTAL** which should include:
  - Contact information and profiles of board members
  - Contact information of key staff
  - Organizational chart
  - List of committees
  - Board meeting schedule for the coming year
  - Copies of mission, vision, and values statement
  - Current by-laws
  - Current strategic and/or business plan
  - Current annual budget
  - Copies of appropriate policies such as investment, conflict of interest and whistleblower
  - Description of programs
- Discuss brief **HISTORICAL OVERVIEW** and key milestones of nonprofit.
- Discuss **MISSION** and provide stories, data and overview of what is being accomplished.
- If appropriate, **INVITE CLIENTS OR CONSTITUENTS** to describe benefits of services and share outcomes.
- **REVIEW FISCAL REPORT** and describe how financials will be provided to board, key indicators the board tracks for fiscal stability.
- Provide copy of **MOST RECENT FORM 990** and audit.
- **REVIEW STRATEGIC PLAN** and discuss and how plan is used and the process for future planning.
- **REVIEW ANNUAL BUDGET**, explaining historical trends in both revenue and expense
- **REVIEW COMMITTEE STRUCTURES** and task force sub-groups and discuss process for serving on a committee.
- If senior management team is in place, **ASK TEAM TO MEET WITH NEW MEMBER** and describe priorities and roles.
- Discuss the ways in which board members engage in **FUNDRAISING STRATEGIES** and the giving expectations for board members.
- **CONNECT NEW BOARD MEMBER TO A SENIOR BOARD MENTOR** – so that throughout the first year the new member has someone to check in with and provide support.

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