



Sample Board Orientation Checklist

New board members receive written and verbal congratulations for being elected (or appointed) to serve on the board and coordinate an orientation meeting. This is to take place prior to the first board meeting in an effort to familiarize the new board member with the board's activities and responsibilities so they can get up to speed quickly and be engaged off the bat.

Board Orientation Process:

- Special meeting for new board member(s)
- Orientation packet
- One on one or small group orientation gathering
- Follow-up meeting/call with board Mentor after the first board meeting

Board Orientation Packet:

- Association Bylaws USBC Association Policy Manual Association Operations Manual
- Policy statements and procedures which have been formally adopted by the Board – Board Obligations, Code of Ethics, Commitment to Serve, Confidentiality Policy & Agreement, Conflict of Interest Policy & Agreement, etc.
- Registered Volunteer Program Information- Athlete Safety Portal log in procedure.
- Tournament Schedule & Procedures.
- Finances/Taxes - annual report, previous year financial statement and current budget.
- Committee information and list of committees with chairperson identified. Who, what, when, where, why, how of each committee.
- Board Meetings: Components of, meeting roles & procedures, Robert's Rules of Order; Minutes from most recent board meeting.
- Overview of association programs and services including marketing, fundraising, website, social media efforts, etc.
- Board Contact list (name, phone, email, top secret Facebook group, text group chat's, etc).
- Alphabet Soup: Glossary of abbreviations and acronyms used to refer to agencies and programs with which the association is connected.
- Information related to "office" location, hours, typical service periods and anything storage related.
- Association/board shirt(s) and any other brand support materials.

Board Orientation Agenda

- Welcome
 - Introductions & Ice Breaker
 - Learn about the new board members interests (potential committees)
 - Purpose and objectives of the training
 - Obtain shirt/jersey size & any other sponsored materials
- Overview of Association
 - Review of Orientation Packet
 - Governing documents
 - Organization's structure
 - Officers, directors, association manager
 - Duties and authorities of each
 - Oversight
 - Requirements for local associations
 - RVP
 - Tournaments
 - Annual meeting
 - Membership service
 - Tax filings
 - Meeting review
 - When
 - Agenda
 - Length of time
 - Virtual options
 - Voting
 - Procedures
 - Association's Tournaments
 - Financial overview
- Association's goals (things you may want their help with the most)
- Tools and Resources
 - Mentor contact and schedule
 - [BOWL.com/ARC](https://www.bowl.com/ARC) & [Facebook.com/groups/usbcassociations](https://www.facebook.com/groups/usbcassociations)
- Questions and Answers
- Close – upcoming board meeting date/time