



Sample Board Orientation Checklist

- New Board members receive written notice of their election to the board stating dates their term begins and ends, regular meeting dates, times, places, and information about the board orientation process.

Board Orientation Process:

- Special meeting for new Board member(s)
- Orientation packet
- Personal phone call or meeting with an experienced Board member (mentor)
- Follow-up meeting with Board Mentor after first three months of Board service

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.

___ Finances/Taxes - annual report, previous year financial statement and current budget

___ Committee information and list of committees with chairperson identified. If committees have regular meeting times and places, these are included. Board organization chart showing committee and sub-committee structure.

___ Association Strategic Plan or current operational priorities

___ Board Meetings: Components of, meeting roles & procedures, Robert's Rules of Order

___ Minutes from most recent Board meeting

___ Association Board & Director Evaluation results & key findings

___ Succession Planning: Procedure and status

___ Overview of association programs and services including marketing, fundraising, website, social media efforts, etc.

___ List of all Board members' names, addresses, phone numbers, terms of office and, possibly a brief bio



___ Association Manager job description, brief bio and contact information

___ Association Calendar, Governance Calendar, Operations Calendar

___ Alphabet Soup: Glossary of abbreviations and acronyms used to refer to agencies and programs with which the association is connected

___ Listing of facilities owned or rented by the association, including address, staff member in charge, and general purpose of the facility

___ Association/Board shirt(s) and any other brand support materials

Board Orientation Meeting: Meet | Connect | Learn | Ask

- Opportunity for personal introductions among new and experienced Board members
- More formal introduction of new Board members by the nominating committee, highlighting background and credentials for new members
- Brief presentations by experienced Board members explaining Board role, responsibilities and procedures
- Brief presentation about scope of association's services
- Structured opportunity for small group discussion by interest areas (i.e. financial, membership, tournaments, programs, planning, fundraising)
- Clear statement of expectations of Board members, including role in association fundraising
- Expectations regarding relationship development of association stakeholders: Center Proprietors, Center Managers, League Secretaries/Officers, Tournament Managers, Association Members
- Review of Orientation Packet and expectations
- Collection of signed 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.
- Introduction to Bowl.com with focus on Association Resource Center (ARC)
- Information regarding USBC Newsletters – eNews, SMART, Rules
- Opportunity for open-ended for questions from new Board member

Personal Contact with Experienced Board Member (Mentor):

- Discussion of new Board member desire/preferences for committee assignment



- Brief explanation of upcoming significant Board decisions or events
- Specific commitment to greet the new Board member at the next Board meeting and provide personal introductions to Board members with common interests

Follow-up Meeting with Mentor After Three Months of Service:

- Opportunity for general comments about Board service to date
- Inquiry into involvement with committees - if no involvement yet, discussion of barriers and problem solving
- Update regarding relationship development of association stakeholders: Center Proprietors, Center Managers, League Secretaries/Officers, Tournament Managers, Association Members
- Update regarding use/familiarity of Bowl.com with focus on Association Resource Center (ARC)
- Request for feedback regarding orientation process