



## **New Trustee Board Orientation Process outline**

- I. Prior to orientation, new Trustees should receive:
  - a. A welcome letter from the Chairman of the Board
  - b. A phone call from the Chairman of the Board
  - c. Electronic Board Manual
  - d. Conflict of Interest Form
  - e. Independent Trustee Form

## **II. Review of Trustee Manual**

### **Part 1**

- i. Organization's History (seasoned Trustee(s) should assist)
- ii. Mission
- iii. General responsibilities of a Board
- iv. Legal rules of governing a foundation
- v. Board structure
- vi. Expectations for board service (new Trustees and TREE Fund)
- vii. Use of technology

### **Part 2**

- viii. Committees
- ix. Role of staff
- x. TREE Fund programs
- xi. The work of our Grantees
- xii. Financials and budget review
- xiii. Conflict of Interest form