

Council Member Orientation Checklist

This checklist was adapted from BoardSource.

This checklist is a general outline to guide the orientation of new DD Council members. Each Council should modify the checklist to ensure all new Council members are provided with the information needed to fulfill their responsibilities.

Program

Tour Council office(s)

Information to share:

- ✓ Share web-site information
- ✓ Annual Calendar
- ✓ Publications and grant projects and other activities

History

Ensure new Council members understand the history of the Council.

Information to share:

- ✓ Share brief written history or fact sheet of the Council
- ✓ Brochures or newsletters

Expected outcomes – Members will know the Council’s mission, purpose, goals, policies, projects and activities, strengths, and needs.

Review 5-Year Plan and Annual Work Plans

Information to share:

- ✓ Review the plans
- ✓ Review summary of progress toward 5-year goals to date.

Expected outcomes – Members will follow trends in the field of developmental disabilities and keep informed.

Finances

Review budget

Teach Council members how to read and understand the budget

Provide an overview of the budget policies and practices; and their responsibilities

Information to share:

- ✓ Current fiscal year budget

Expected outcomes – Members will read and understand the Council’s financial report and help the Council fulfill its fiduciary responsibility.

Organizational Structure

Review by-laws

Organizational Chart

Staff members and their key responsibilities and how members are to interact with specific staff members.

Committee descriptions (if applicable)

Information to share:

- ✓ List of staff positions and “who does what”
- ✓ Bylaws
- ✓ Committee descriptions

Expected outcomes – Members will urge staff members with grievances to follow established policies and procedures through their supervisors. All significant matters coming to a Council member should be called to the attention of the Executive Director and/or the Chairperson as appropriate.

Member Roles and Individual Council Member Responsibilities

Role of whole Council versus the responsibilities of individual Council members

Role of advocacy in mission achievement

Information to share:

- ✓ Conflict of Interest policy
- ✓ Council member position description
- ✓ Council member roster
- ✓ Recent Council meeting minutes

Expected outcomes – Members will prepare and participate in Council and committee meetings including appropriate Council activities when possible. Act as an ambassador for the Council when in public, speak with one voice. Understand and embrace fiduciary responsibilities. Suggest possible nominees for the Council to recommend to the Governor.

Council Operations

Council member manual

Committee or task force assignments

Attendance expectations

Information to share:

- ✓ Schedule of Council meetings
- ✓ Schedule of Committee meetings
- ✓ Full Council and committee rosters

Expected outcomes – Serve in leadership positions and undertake special assignments willingly and enthusiastically. Attend all Council meetings and come prepared to participate.

