Board Building Kit Checklist

**Tab 1- General Organization Information**

* Mission & Vision Statement
* Bylaws
* Operating Principles
* Policies & Procedures (Conflict of Interest, Non-discrimination, Child Protection, Anti-terrorism, Staff/Volunteer Handbook, Social Media, etc)
* Board Member Names/Contact Info
* Application for New Board Members (to share with prospective board members)

**Tab 2- Finances**

* Current Operating Budget
* Capital Campaign Budget/Items
* Program Budget Breakdown
* Breakdown of Significant Program Income/Expenditures

**Tab 3- Programs**

* Overview/Summary of Programs & Fees
* Impact Reports
* Testimonies, Stories, & Photos

**Tab 4- Events**

* Calendar of Events
* Promotional/Marketing Materials to distribute (insert 5-10 in each folder)
* Request Letters (for sponsorship/support of events; insert 5-10 in each folder)
* Procurement Forms (simple spreadsheet for board members to note contributions/contacts that they have made on behalf of the organization)

**Tab 5- Action Items**

* Board Engagement Form
* Strategic Plan with Status Report Column
* Board Building Exercises or Resource Sharing Tools

***Create a board tool kit using 3-ring binders and tab dividers.***

***Be strategic and personalize content.***