Some of this information was provided to the board member in their recruitment packet but it is a good idea to provide it again. Below is a general checklist of items that you might provide to your new board member.

**General Information**

* History of the district
* Organizational structure
* Vision and mission of the district
* Strategic priorities, goals and objectives
* Immediate projects or initiatives the board is directly involved with
* Current challenges and opportunities the district is facing
* Key partnerships
* Summary of programs and services
* Summary of contractual obligations

**Roles and Responsibilities**

* Review board member role
* Review executive director/general manager role
* Review staff roles
* Review committees and their roles
* Discuss expectations for new board members
* Provide copy of [SDAO Board Member Handbook](https://sdao.specialdistrict.org/files/abb83e714/board-handbook.pdf)
* Provide copy of [OGEC Guide for Public Officials](https://www.oregon.gov/ogec/Documents/2021%20PO%20Guide%20Final%20Adopted.pdf) handout
* Provide copy of [Attorney General’s Public Records and Meetings Manual](http://www.doj.state.or.us/wp-content/uploads/2017/06/public_records_and_meetings_manual.pdf)

**Policies and Procedures**

* Provide district policies and procedures
* Review board policies and procedures

**Financial Management**

* Discuss budget process
* Provide current year’s budget
* Provide a copy of up-to-date audited financial statements
* Provide a copy of most recent annual report
* Provide a copy of the district’s insurance policies

**Other Information**

* Invite board member to attend and participate in public board meetings prior to being sworn in
* Provide copies of minutes from previous board meetings for the past twelve months
* Provide a list of board members and staff and their contact information
* Give a tour of the facilities and offices
* Provide brochures and other promotional materials