Script to go with Agenda for Board 101 Orientation

1. Give everyone their folder, go through it, sign the Conflict of Interest Policy and answer their Getting to Know them questions
   a. Have them turn in when they are finished

2. Welcome and Introductions – 10 words or less!
   a. Myself, Amanda and Lacee, and then rest of the room goes
   b. Tell them that this is a comfortable and casual environment. Get up, get food, stand, get coffee, use restrooms, etc.
   c. Ask them what they hope to get out of their board experience this year – ask Allyson to write this down.

3. After introductions, play the bingo game till about 9:15.
   a. Then introduce slides about five things you may not know about me

4. Click over to Tim’s Zoom Meeting Link and have him go through all things global
   a. Have a link/ be prepared to log into CLRP

5. Board 101
   a. What is the Pres Trio – Anna
   b. 3 Duties for each department – Charlie
      i. Pull from Volunteer handbook
      ii. Utilize your knowledge and thoughts for what each dept should do
   c. Expectations of board members – Anna
      i. Come to board meetings, events, ask questions, be involved, ask for help, be positive
   d. Robert’s Rules of Order – Allyson
   e. Business Plan – What this is and why it’s important – Lacee
   f. Board Reports – why it’s so important to fill these out and turn in on time – Amanda
   g. Policies and Bylaws – Anna
   h. Leadership Tree – have them pull out of folder and explain – Charlie
6. Chapter Administrator Overview – Allyson

**Break**

7. Department Meetings:
   a. What I wish I would have known when I first joined the Board – Charlie to Present
   b. Review Job Descriptions in the Volunteer Handbook – Move into Transition Meetings
   c. Work on slides
   d. Prepare for needs / expectations
      i. Ask them to jot down notes and ideas and in talking with the person currently in the role to tell them what they think they might need or expect from others
      ii. Make sure to switch half way through for those who are staying on board and moving into new roles

8. Budget Overview
   a. What it is – Lacee
   b. How it affects each department – Amanda
   c. Identify challenge areas for upcoming year – Anna

9. Round Robin
   a. Ask new board to explain how they fit into the bigger picture
   b. What will they need or want from everyone else on the board
      i. Go around the table for this

10. Review – Anna
    a. Google Drive
       i. (have link to drive in powerpoint)
       ii. 18 Month calendar – screen shot and talk briefly about it and why it’s so important
       iii. Important dates to note:
            1. CBS
            2. Board 101 from Global
            3. Retreat
            4. Gala
            5. WEC

11. Retreat – Anna
    a. Where: The Lord Jeffery Inn Amherst MA
    b. Start time will be noonish
c. Comfortable! Casual! Dinner the first night will be a little more dressy – more details later on that

d. Laptop, presentations, notes, open minds, hungry bellies, positive attitude

e. Mark Bice! ☺

12. Final Remarks