

Candidate Meeting Checklist

Who schedules the meeting?

The Nominator should contact the Candidate and coordinate a meeting date/time.

Whom should attend?

- Nominator
- Representative from Governance Committee
- Board president or other officer

What do we bring?

- | | |
|---|--|
| <input type="checkbox"/> Program description | <input type="checkbox"/> Board Member list/directory |
| <input type="checkbox"/> Board member job description | <input type="checkbox"/> Give or get policy |
| <input type="checkbox"/> Board meeting calendar | <input type="checkbox"/> Annual operating budget |
| <input type="checkbox"/> Program brochures (marketing material) | <input type="checkbox"/> Strategic plan work plan |
| <input type="checkbox"/> Fundraising plan activities | <input type="checkbox"/> Committee list/descriptions |

What are the goals of this meeting?

- Share the mission and purpose of the organization
- Learn more about the candidate
- Determine if there is a shared interest, mission alignment, and personality fit.

What topics should we cover?

- Mission, Vision, Purpose
- Programs/Services
- Strategic goals and objectives
- Board member role, fundraising expectations, time commitment
- Next steps

