



New Investment Committee Member Checklist

Set your new member up for success

You have found just the right person to join the committee. Great news! A thorough onboarding process is the next step in setting the new member up for success. Below are the steps we recommend to help your new member hit the ground running:

- Organization Overview.** Provide a thorough overview, including things like:
 - Background and mission
 - Key challenges and successes
 - Overview of leadership team and staff
 - Overall financial overview
 - Upcoming events/fundraising activities

- Governance Approach.** Review the committee governance approach and decision-making processes, including:
 - How the committee functions, what are the various roles and how are decisions made
 - How meetings and interim communications are handled
 - Meeting schedule and expectations

- Investment Strategy/Portfolio Review.** Your investment partner or consultant will likely be helpful at this step. Bring the new member up to speed on:
 - Objectives of the various asset pools
 - Committee attitudes toward risk/return and specific asset classes (Share any surveys of existing committee members attitudes/views.)
 - Review of current asset allocation and portfolio results
 - Changes currently under consideration

- Introduce new member.** Before the first meeting:
 - Add new member to all distribution lists, provide necessary web and portal logins
 - Provide contact information and committee profiles for other committee members and staff
 - Provide new member with a list of key staff and members for introductory meetings
 - Share the new member's profile with the team

Looking for more committee member onboarding tools? Contact us at institutions@seic.com for a helpful onboarding packet that we provide to our clients.