SHIFRIN LEGAL
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New Director Orientation Checklist

Illinois community associations

An onboarding checklist for governance, finances, conflicts, and key records.

How to use this resource

Replace all bracketed prompts, confirm dates and authority, and delete this instruction page before distributing the completed document. Leave any necessary explanatory terms in the final form.

- Use for onboarding and annual board refreshers. Confirm duties and authority under the association's actual instruments.
- Provide secure access to records without sharing passwords or broadly distributing privileged files. Review current conflicts and pending deadlines.
- This is an orientation checklist rather than a certification of statutory training compliance.

Important use notes

Educational sample only. Customize for your association and have counsel review applicable law and governing documents. Use does not create an attorney client relationship with Shifrin Legal, Inc.

Legal reference

Illinois Condominium Property Act, 765 ILCS 605, especially Sections 9, 18, 18.8 and 19. Noncondominium communities should separately review 765 ILCS 160 and their governing documents. Apply the version effective on the date of use; future-effective amendments are not treated as current requirements in these samples.

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[ASSOCIATION NAME]

Director Orientation Record

Director: [NAME] Term: [DATES] Orientation lead: [NAME]

[ ] Declaration, bylaws, rules and amendments reviewed.

[ ] Applicable statutes and fiduciary responsibilities discussed.

[ ] Board versus membership authority explained.

[ ] Meeting notice, quorum, open votes and minutes procedures reviewed.

[ ] Approved budget, financial reports and reserves reviewed.

[ ] Insurance coverages and reporting contacts identified.

[ ] Major contracts, renewal dates and pending projects reviewed.

[ ] Conflict disclosure submitted and confidentiality expectations reviewed.

[ ] Owner communication and complaint procedures explained.

[ ] Current litigation and privileged information reviewed securely.

[ ] Emergency contacts and delegated authority identified.

[ ] Record retention, lawful owner access and technology practices reviewed.

[ ] Required or recommended training scheduled as applicable.

Questions and follow up: [DETAILS / RESPONSIBLE PERSON / DATE]

Orientation completed: [DATE]. Director acknowledgement: [SIGNATURE].