

Coreinsights™
Premier Training and Strategic Guidance

**TEFN Connect Webinar and
Interactive Learning Series**
- June 10, 2021



Onboarding New Board Members is NOT Just an Orientation!



www.coreinsightsleadership.com

1

Board Engagement

“Bringing on a terrific board member is only the first step. Taking time to ensure that each board member becomes personally invested and engaged in the mission of the organization is time well spent. When truly engaged, board members will become your nonprofit’s best ambassadors, advocates, strategists, and all-around supporters.”

- National Council of Nonprofits

2

Questions We’ll Answer Today about New Board Members

- What do they need to know?
- What do they need to experience?
- Who do they need to connect with?
- What are best practices for creating Ambassadors?

3

Our Premise:

If your board is engaged, your organization is far more likely to thrive!

There are distinct ways you can build board engagement...from the VERY BEGINNING!

4

What do they need to KNOW?

- Background on the focus of the mission
- High level view of the strategic plan
- Roles and responsibilities
- Procedures/Robert's Rules cheat sheet
- Contact information
- Financial status
- Expectations
- Challenges
- Programs
- Key dates
- History
- Bylaws

5

When do they need to know it?

- R Background on the focus of the mission
- B4/1 High level view of the strategic plan
- R/B4 Roles and responsibilities
- 3 Procedures/Robert's Rules cheat sheet
- 1 Contact information
- 1 Financial status
- R Expectations
- R Challenges
- R/BR Programs
- B4/1 Key dates
- 3 History
- 3 Bylaws

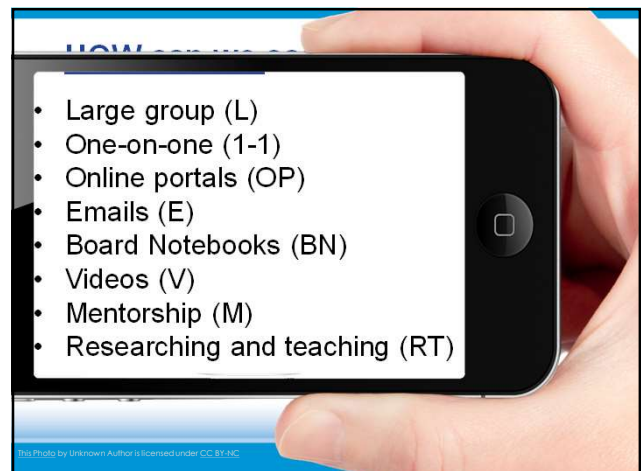
When do they need to know this?
R = Recruiting
B4 = Before they start
1 = First month
3 = First 3 months

9

HOW can we communicate?

- Large group
 - Quiz
 - Activities
- One-on-one
- Online portals
- Emails
- Board Notebooks
- Videos
- Mentorship
- Researching and teaching

11



12

HOW can we communicate?

In your breakout:

- Share your name and foundation
- Briefly discuss, how can we communicate the items board members need to know?

13

What do they need to EXPERIENCE?

- The organization in action
 - Fundraising event
 - SurPrize Patrol
 - Grants being utilized
 - An ask
- Testimonials of impacted people
 - Teachers and students sharing
- A board meeting
- Board social
- Orientation

14

Who do they need to CONNECT WITH?

- Executive Director
- Board Chair
- Other board members
- Board Mentor
- Senior staff
 - Foundation
 - ISD staff

15

What are the best practices for Creating Ambassadors?

- Define the culture and live it out
- Give board members opportunities to shine
- Make relationships a critical component
- Look for opportunities to celebrate
- Create wins for new board members
- Equip and train them to share
- Help them see how to make an impact

16

Be aware of HOW we can accomplish it:

- Small groups in our board meetings
- Learn together
- Dine together
- Challenge them
- Self-directed learning
- Have big goals
- Mentorship



17

ALSO...

- Go see them
- Call them



18

ALSO...

- Address the



19



20

Make it Personal!

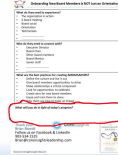
Please type into chat:

What concept excited you the most?

21

Make it Personal!

- What will do immediately considering what you experienced today?
- What are ideas you want to put into place, but need to plan for?

A screenshot of a survey form titled "Evaluating the Leadership Network's 2017 Service Experience". The form contains several sections with checkboxes and text input fields. A red circle highlights a section at the bottom of the form, which appears to be a feedback or comments section.

22



Thank you for attending!

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Please take 2 minutes to
submit your evaluation!

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Foundation Innovation LLC | www.foundationinnovation.com

TEFN has partnered with Foundation Innovation, LLC for the launch of TEFN Connect. This comprehensive resource center is a service tailored just for education foundations and has been developed for you at no cost and an added benefit to TEFN members. For more information, please visit tefn.org or foundationinnovation.com.

23