

Onboarding New Board Members is NOT Just an Orientation

What do board members 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 for board and key staff
- Financial status
- Expectations
- Challenges
- Programs
- Key dates
- History
- Bylaws

When do they need to know this?

R = Recruiting

B4 = Before they start

1 = First month of service

3 = First 3 months of service

Activity:

_____	_____	_____	_____
_____	_____	_____	_____

How can we communicate?

- Large group (L)
- One-on-one (1-1)
- Online portals (OP)
- Emails (E)
- Board Notebooks (BN)
- Videos (V)
- Mentorship (M)
- Researching and teaching (RT)
- _____
- _____

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What do they need to experience?

- The organization in action
- A board meeting
- Board social
- Orientation
- Testimonials

- _____
- _____

Who do they need to connect with?

- Executive Director
- Board President
- Other board members
- Board Mentor
- Senior staff

- _____
- _____

Additional Notes

What will you do differently in light of this session?

Thank you!
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