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Introduction

When someone commits to board service, they agree to accept a lot of responsibility for the organization. They’re tasked with making strategic decisions that drive long-term financial success for the mission – often on a strict timeline. With as much as they’re responsible for, there are countless points along the road where boards can veer off in the wrong direction.

Many times, boards of directors are derailed due to nothing more than confusion or uncertainty, which can happen when board members don’t understand the expectations, goals, or even basic processes of the boards they’re joining. They see board service as a way to give back to their community but don’t always know what that commitment entails. Then, when issues or questions arise, even the most thorough handbooks can’t account for every contingency.

That’s why effective onboarding is so vital for boards – particularly volunteer boards where not everyone has prior experience in the sector. Onboarding helps get everyone on the same page regarding the organization’s policies and what day-to-day duties will look like.

While it’s clear that brand new boards should have steps in place to welcome new members, well-established organizations need to frequently revisit their onboarding processes, too. It doesn’t matter if your board was established several years ago or you’re starting from scratch – best practices are always changing, more boards are becoming remote or hybrid, and organizations are constantly finding better ways to bring their boards up to speed.

This e-book will delve into the 5 easy (yet often overlooked) steps organizations can take to prepare their board members, whether in person or remote, for successful terms. We’ll even share a convenient checklist for building out a new board member manual. It’s time to create a much more welcoming environment for board members from before they ever even step in the boardroom!
Onboarding Starts With Recruitment

Contrary to popular belief, onboarding doesn’t start the moment a new board member walks in the room. It doesn’t even start when you send a “Welcome Aboard” email. It starts in the early recruitment stages where you’re communicating expectations and figuring out if they’ll be a good fit.

It’s no small feat to find the right combination of creativity and enthusiasm in prospective board members. Will they mesh well with your current board members? It’s a gamble!

When you’re recruiting new board members and finding people who will be assets to the organization, be sure to address the following attributes:

1. **Mediation Skills:** Board service is a masterclass in compromise. New board members might feel overpowered by other members who have been there longer or who have assumed leadership or spokesperson roles on the team. Look for candidates who are *willing to listen* to those who have board experience, while also *knowing when to speak up* when they have something of value to add. Finding veteran board members who are willing to mentor new people virtually or in person can be helpful in developing mediation skills, too.

2. **Fundraising Skills:** While fundraising might not be the number one thing that board members handle, they definitely play an important role in development. When creating an application or posting an announcement for new board members, point out fundraising skills as a requirement.

3. **Expectations and Goals:** Because board members are volunteers and might not have prior sector experience, many board members are often unaware of the actual responsibilities associated with the day-to-day work of serving on a board. However, finding the right people to lead an organization is *critical* to its sustainability. Take time during the application, interview, and onboarding process to make sure you’re completely transparent with candidates about expectations, individual members’ roles, and how success will be measured.
Step 1: Develop an Onboarding Framework

When new board members start, it can be tempting to jump in feet first, get them set up on committees, and have them start making decisions right away. You want to put their skills to work as soon as possible, but this doesn’t give them any time to get acclimated!

Instead, boards should have an onboarding framework that is replicable and scalable. No matter when they join, every single new board member should hear the same message, learn the same processes, and experience the same lessons. This will help alleviate any confusion or uncertainty down the road. The framework should be created within a collaborative, thoughtful process that considers multiple perspectives.
No matter your mission, a strategic onboarding framework should include:

- **A broad, inclusive approach to the mission and values of the organization.** What are board members trying to achieve?

- **Input from current board members.** What would have made their early days on the board better? What would have made them more productive?

- **A detailed description of all committees.** What kinds of decisions and programs are each committee responsible for?

- **A section for ongoing education and development.** How will the new board member continue to grow and develop within the board?

Having a framework that accounts for these core elements with each new class of directors you bring in will make sure everyone’s on the same page, no matter when they join. Not to mention, a scalable structure ensures that your onboarding process can grow as your organization does. No need to start from scratch when you have a solid foundation in place. You’ll be able to simply update your onboarding resources with information regarding new committees, changing organizational goals, responsibilities, and guidance from the most recent board members.
Step 2: Determine Which Team Members Own Onboarding

In the most efficient and well-organized boardrooms — whether online or in a physical space — every single person has a unique role that allows the board to operate like a mini corporation of its own. Just like big companies have a team that’s dedicated to managing onboarding, so should your board. Depending on the size of your team, either appoint a single person or establish a committee to handle all things onboarding.

With one committee that owns onboarding, there should be minimal overlap between teams. This group should be responsible for gathering the correct information and documentation from:

- All the other committees
- The organization’s staff
- Any third-party thought leaders

This will also give new board members an important resource to go to with any questions, concerns, or inquiries instead of having to hunt down several different people from different teams.
Step 3: Collect and Organize Onboarding Content

If you’ve worked in the sector for a while, it shouldn’t come as a surprise that boards require and manage an incredible amount of content and information. This is especially true for new board members, who should have access to all of this critical content and additional onboarding documents.

This is where the board book enters the conversation. Typically, whoever owns onboarding is responsible for collecting and organizing all components of a board manual.
Get a complete checklist of everything you need to complete your board book on page 14.

Want to delve into the wonderful world of effective documentation as you reinvent your board manual? *Why It’s Time for Modern Boards To Blow Up the Board Book* is another resource created by the board management experts here at Boardable. It reimagines the traditional approach to board books and takes a closer look at what information you should include as well as how you can make it completely accessible to board members. No need for a messy onboarding experience when you have an organized board book that’s easily adaptable and accessible to new board members.
Step 4: Engage New Board Members

In many cases, new board members are elected to serve on a board by the current members, so they’ve met each other already. Regardless, once a new board member has been brought in and been sent the board manual, it’s time to kickstart their engagement with other board members.

Introducing new board members to current board members can be done through:

1. Social Events or Gatherings: Even before new board members step foot in the boardroom, you might want to host an informal, virtual social gathering. This way, your new board members will get to know their peers on a social level, which can help ease any wariness or discomfort before the first meeting.

2. Committee Roundtables: If your committees meet on days outside of your normal board schedule, have the new members attend these to observe. New board members should attend committee meetings for all committees, not just the ones they will be a part of. This gives them an inside look at how each committee is run, how it arrives at decisions, and how different team members work together. They’ll come to understand how their committee duties align with others’.

3. Board Meeting Introductions: And finally, the big day arrives: the new board members’ first board meeting! Instead of kicking things off like any other meeting, take a moment to introduce your new members to the group. Have everyone else go around and introduce themselves along with the positions they hold on the board. Give new members a chance to share a little about themselves along with an explanation of the connection they have with the organization.
Step 5: Continually Revisit the Onboarding Process

No matter your industry, board work is never complete! There are always new processes, ideas, and procedures that can be implemented to build a more seamless, productive organization. This is why metrics, feedback, and transparency are all so critical.

As someone who's in charge of the board's efficiency, you should provide valuable training resources to your board members to help them continually develop new skills and grow in their roles, which will ultimately help your entire organization be more successful.
At no point in the process is training more important than during onboarding.

Optimizing this process isn’t a one-person job. Every new board member who comes through your doors will have feedback, suggestions, and ideas for the onboarding process. This helps you tap into innovative perspectives and ideas that will keep advancing your team.

While growing boards must have a single scalable process to work from, it should not be static by any means. All feedback should be measured and weighed to determine whether or not it will make your onboarding process stronger. This includes asking questions like:

- What content do new board members receive? What content do they find valuable?
- How are new board members accessing your board manual and other onboarding documents? **Hint: A digital documentation solution makes accessing materials much more convenient.**
- What kinds of communication are being sent before new board members’ first meeting? What about communication to other board members introducing new members?
- Can new board members confidently speak to the mission, vision, and goals of both the organization and the board itself?

Between asking these questions and any others you think of, consistently assessing and improving your onboarding activities allows you to create a very valuable and welcoming process. Not to mention, you won’t have to do a complete overhaul every few years if you’re constantly updating your materials and strategies!
Board Manual Checklist

We gave you a preview of what materials new board members should receive to make sure they’re adequately prepared to lead your organization. Now, let’s go into a little more depth.

What exactly should go into a board manual for new-member orientation? Each organization is different, but here are examples of information you could include to help you get started:
**Staff & Programs**
- List of all current staff members, including job titles and role descriptions
- Chart showing the structure of the organization
- Employee handbook, program descriptions, policies, and procedures

**Organizational Information**
- Brief written history, fact sheet, or overview of the organization
- Articles of incorporation, bylaws, and IRS determination letter
- List of past board members and their roles

**Logistics & Policy Information**
- List of current board members’ names, contact information, bios, and roles within the board
- Board terms of all current board members
- Statement of responsibilities and expectations of board members
- Board meeting attendance policy
- Board member conflict of interest policy
- Miscellaneous documents, including pledge forms and insurance policies
- Operational calendar that’s updated annually

**Organizational & Operational Guidelines**
- Policy for recruiting, orienting, informing, and cultivating board members
- Succession guidelines and policy for unplanned board member exit
- Expectations and guidelines for board member performance evaluations
- Plan for interviewing and selecting a board chair
- Descriptions of different committees, task forces, or subcommittees

**Strategic Framework of the Organization**
- Mission and vision statement
- Strategic plan and roadmap of the organization
- Detailed action plan including objectives, responsibilities, timelines
- Ongoing status reports for the organization

**Meeting Minutes & Reports**
- A year’s worth of past board meeting minutes
- Reports and documentation from past committee meetings
- Any other reports, metrics, and minutes from the board

**Finance & Fundraising Reports**
- Financial reports for the organization, including prior annual report, most recent audit report, and current annual budget
- Financial forms required for the organization, including Form 990, banking resolutions, and investment policy
- Details around fundraising, including current donor list, fundraising plan and digital strategy, and a list of go-to fundraising sources

**Marketing Information & Supplemental Information**
- Contact information, including the organization’s website and donation site
- Promotional materials such as marketing pages, branding guidelines, and messaging overviews
- Guides for any tools or resources your team is using to manage board output
- Emergency contact info and communication plan
Conclusion

Onboarding is a critical time for your team. It’s the first impression that new board members have of your organization, and whether or not the rest of their terms go well depends heavily on their onboarding experience. You should naturally want to make the most of every moment!

Remember, successful onboarding starts with superior recruitment, which means you should think through how you’ll welcome people before they step foot in the boardroom for the first time. They should understand expectations and know exactly the depth of the commitment they’re making. That’s the only way you’ll wind up with people who will do everything they can to lead your organization along the path of success.

Even once you put together a comprehensive board manual (with the help of Boardable’s Document Center!) and immersive training opportunities, improving your onboarding process will be an ongoing priority. That way, each new class of directors will be more and more prepared. In no time, you’ll start welcoming new board members with open arms!
Are you ready to refine your onboarding processes and maximize engagement in the boardroom?

Launch a digital transformation with Boardable.
About Boardable

As leaders in the space, we understand the frustration you feel (and the hours you lose) just from organizing board meetings — let alone staying productive and communicating between them via email, phone, and text. We’ve lived that reality. After tirelessly searching for the right solution but not finding it, we decided to build it ourselves!

Boardable is an online board management portal that centralizes communication, secure document storage, meeting planning, and everything involved with running a board of directors. Founded in 2016 by nonprofit leaders and founders, Boardable has a mission to improve board engagement for nonprofits. Boardable is based in Indianapolis, Indiana. Learn more at www.boardable.com.

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