5 Steps to Onboarding New Board Members

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Boards accept a lot of responsibility for nonprofit organizations. They are tasked with making strategic decisions and choices that drive long-term financial and charitable success. Simply put, there are countless points along the road where boards can veer off into dangerous territory. Many times, nonprofit boards are derailed due to nothing more than confusion or uncertainty, which can happen when board members don't understand the expectations, goals, or even the basic processes of the boards they're joining. When issues or questions arise, even the most thorough handbooks can't account for every contingency.

This is why effective onboarding is so critical for nonprofit boards. Whether you're bringing new members onto a board that has been together for years or you're starting a board from scratch, onboarding new board members empowers and prepares them for the job ahead.

This ebook will delve into the 5 easy steps nonprofits can take to prepare board members successfully for their participation.

Onboarding Starts with Recruitment

Contrary to popular belief, onboarding doesn't start the day a new board member walks into the room. It doesn't even start when you send a "Welcome Aboard" email. Onboarding begins in the early recruitment stages. It is 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 deciding which attributes to focus on, keep the following in mind:

Fundraising Skills: While fundraising might not be the number one thing that board members advertise, it's definitely one of the most important things they're responsible for. If you're creating an application or announcement for new board members, point out fundraising skills as a necessary requirement.

Mediation Skills: Being on a nonprofit board is a masterclass in compromise and discussion. New board members can often feel overwhelmed or overpowered by other members who have been there longer or who have assumed leadership or spokesperson roles on the team. Look for board member candidates who are willing to learn patiently. Finding veteran board members who are willing to mentor new people can be helpful, too.

Expectations & Goals: Because board members are volunteers, and because finding the right people for a nonprofit is so critical, many nonprofit board members are often unaware of the actual responsibilities associated with the day-to-day work of being on a board. During the application, interview, and onboarding process, make sure you're completely transparent with board candidates about board expectations, members' roles, and how success will be measured.

Step 1: Develop a 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 – without ever allowing the member time to get acclimated.

Instead, nonprofit boards should have an onboarding framework that is replicable and scalable. This ensures that every single new board member hears the same message, learns the same processes, and experiences 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.

According to **Board Source**, a strategic onboarding framework should include:

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

Step 2: Determine Who Owns Onboarding

In the best nonprofit boards, every single person has a unique role or responsibility that allows the board to operate like a mini corporation. And, just like a company has a dedicated HR or people team that is responsible for onboarding, so, too, should nonprofit boards appoint a single person or committee to handle all things onboarding.

With one committee owning onboarding, there should be minimal overlap between teams. This group is responsible for gathering the correct information and documentation from all the other committees, from the nonprofit team itself, and from any third-party thought leaders. This will also give new board members an important resource to go with any questions, concerns, or inquiries instead of having to hunt down several different people from different teams.

Step 3: Collect and Organize Onboarding Components

For those of us who work with nonprofits, it's no surprise that boards require 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 more. This is where the board manual enters the conversation. Typically, the onboarding owner would be responsible for collecting and organizing all components of a board manual, which include:

- Nonprofit Staff & Programs
- Nonprofit Information
- Logistics & Policy Information
- Organization & Operational Guidelines
- Strategic Framework of the Nonprofit
- Meeting Minutes & Reports
- Finance & Fundraising Overview
- Supplemental Information & Appendix

See pages 10-11 for more detailed suggestions.

Step 4: Engage 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 get them engaged with other board members.

According to Create the Future, introducing new board members to current board members can be done through:

Social Events or Gatherings: Once you have elected new board members, it's a good idea to have an informal social gathering before your first board meeting. 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.

Committee Roundtables: If your committees are meeting on days outside of your normal board schedule, have the new members attend these as observers. New board members should attend committee meetings for all committees, not just the ones they will be a part of, to get an inside look at how each committee is managed, how it comes to decisions, and the ways different members of each team work together.

Board Meeting Introductions: And finally comes the big day: the new board members' first board meeting. Before you kick things off like any other meeting, make sure you introduce your new members to the group. Have everyone else go around and introduce themselves along with the roles they play or the positions they hold on the board. Give the new members a chance to give a brief bio along with an explanation of the connection they have with the nonprofit organization.

Step 5: Optimize the Onboarding Process

For nonprofit boards, much like other industries and teams, work is never really done. 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 a nonprofit leader, you should provide valuable resources to your board members to help them continually develop new skills and grow in their positions, which will ultimately help your nonprofit be more successful. At no point in the process is this more important than during onboarding.

Luckily, optimizing this process isn't a one-person job. Every new board member that comes through your doors will have feedback, suggestions, and ideas for the onboarding process. While nonprofit 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 are new board members receiving? What content do they find valuable?
- How are new board members accessing your board manual and other onboarding documents?
- What kinds of communication are being sent before new board members' first meeting? What about communication to other board members welcoming new members?
- Can new board members confidently speak to the mission, vision, and goals of both the nonprofit and the board itself?

Get Started with Effective Onboarding

Building an effective onboarding strategy doesn't have to be difficult, but it is necessary in order to build a thriving and effective board. Keep these five steps in mind when revisiting your onboarding strategy:

- Step 1: Develop a Framework
- Step 2: Determine Who Owns Onboarding
- Step 3: Collect and Organize Onboarding Components
- Step 4: Engage Board Members
- Step 5: Optimize the Onboarding Process

Board Manual Checklist

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:

Nonprofit Staff & Programs

- ☐ List of all current staff members, including job titles
- ☐ Organization chart showing the structure of the organization
- ☐ Employee handbook, program descriptions, policies, and procedures

Nonprofit Information

- ☐ Brief written history, fact sheet, or overview of the nonprofit
- ☐ 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, insurance policies, etc.
- ☐ Operational calendar that can be updated annually

Organization & Operational Guidelines

- ☐ Policy for recruiting, orienting, informing, and cultivating board members
- ☐ Policy for unplanned board member exit
- ☐ Expectations and guidelines for board member performance self-evaluation
- ☐ Plan for interviewing and selecting a board chair
- ☐ Descriptions of different committees, task forces, or subcommittee

Strategic Framework of the Nonprofit

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

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 directors

Finance & Fundraising Reports

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

Marketing Information & Supplemental Information

- ☐ Contact information, including the nonprofit'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

About Boardable

Built by nonprofit leaders, for nonprofits. Boardable empowers you to work more effectively with your boards and committees. We know the frustration you feel (and the hours you lose) just from organizing a meeting via email, phone, and text. We've lived it. We're from the nonprofit world, too. After looking around for the right tool but not finding it, we decided to build it. Boardable is a software platform that centralizes all communication between you and your board. Find the best meeting times, securely store all of your documents, archive discussion threads and more—all in one place.

For more information, to schedule a demo, or to sign up for your FREE 14-day trial, visit us at **boardable.com**.