effective onboarding
what new board members need on day one

Cyrus N. White, principal consultant
strategic planning and governance with nonprofit boards
onboarding
onboarding > orientation
20% - 33% of Board Members May Be New Every Year
47% of Nonprofits Report Difficulty Finding New Board Members

Source: BoardSource Nonprofit Governance Index 2012
Clear Roles | RAISE EXPECTATIONS

High Expectations | ENHANCE PERFORMANCE

Strong Performances | DRIVE PARTICIPATION

Source: Why Board Members Participate, Widmer, Nonprofit and Voluntary Sector Quarterly 1985 14: 8
4-phase onboarding process

- **engage**
- **train**
- **mentor**
- **assess**

1 year + Nomination to 1st meeting 6 months to 1 year End 1st year End of 1st term

© 2016 The South Cabin Group LLC
How do you engage potential directors?
onboarding process | Train
Orientation enhances confidence

**Structured Orientation**
- Very Well Informed: 18%
- Well Informed: 53%
- Somewhat Informed: 27%
- Not Well Informed: 1%

**No Structured Orientation**
- Very Well Informed: 4%
- Well Informed: 39%
- Somewhat Informed: 48%
- Not Well Informed: 8%

Source: BoardSource Nonprofit Governance Index 2012
Divide training into 3 segments . . .

| Organizational Profile                          | 1. Values & Assumptions                        |
|                                               | 2. Impact & Outcomes — Ends                   |
|                                               | 3. Programs & People — Means                  |
| Roles & Responsibilities                      | 4. Governance & Management                    |
|                                               | 5. Fiduciary Duties                           |
|                                               | 6. Legal Responsibilities                     |
| Board Policy & Process                        | 7. Board Policy & Expectations                |
|                                               | 8. Peer Mentors                               |
|                                               | 9. Assessments                                |
onboarding process | Mentor
“**Peer Mentors** have been helpful when we got the pairings right.

<table>
<thead>
<tr>
<th>Those folks who have a mentor who . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>checks in with them, especially during the first six months, helps them get ready for their first board meeting, and sits next to them at board meetings</td>
</tr>
<tr>
<td>. . . usually get better integrated.</td>
</tr>
</tbody>
</table>

Those sound like no-brainers, but you would be amazed at the difference it makes in getting a new member functioning.”

_Terry Stone_  
executive director  
CenterLink
onboarding process | Assess
What would you discuss with a director at the end of her first term?
reference | Governance Documents

- committee charters
- governance policies
- bylaws
- articles of incorporation
reference | Communication Plan

- contact tree
- media & spokesperson policies
- alert triggers

Images courtesy iStockphoto users IvelinRadkov, ISpyFriend, ZoneCreative, MadMaxer
reference | Meeting Schedules

board meetings
committee meetings
special events
12-month agenda
Examples provided as information only, with no endorsement given nor implied.
relational | the Executive Director
relational | Peer Mentors
ENGAGE. TRAIN. MENTOR. ASSESS.
What may be useful in your organization?

What do you intend to learn more about?
Selected Resources

*Getting on Board with Effective Orientation: A BoardSource Toolkit*
(PDF format only, BoardSource)

*10 Things Every Foundation Board Member Should Know*
(PDF format only, 2013, The Council on Foundations in collaboration with BoardSource)

*Ten Basic Responsibilities of Nonprofit Boards, 3rd edition.*
by Richard T. Ingram. (2015, BoardSource)

*Board Member Orientation: The Concise and Complete Guide to Nonprofit Board Service*
by Michael E. Batts. (2011, CreateSpace)

strategic planning

- board development
- succession planning
- board self-assessment
- board process and policy

thanks.