



## Board Orientation and Onboarding

### Options, Best Practices and Considerations

#### Orientation Best Practices

**Timing & Structure:** Depending on your board recruitment cycle or need to fill a vacancy more immediately, the timing of orientation may vary. If possible, try to **host one or two cohorts per year** (ie: January and June) to maximize your efforts and build a sense of connection amongst new cohorts. Twice per year board recruitment cycles can also aid in staggered terms but is not necessary. Orientations may take place in conjunction with pre-existing board meetings or as a separate meeting. If you plan to host your orientation in conjunction with a regularly scheduled board meeting, here are some suggestions:

1. **Preceding Board Meeting:** This option may work best if you have a January or mid-fiscal year cohort. Bringing the new board members together prior to the regular scheduled board meeting will allow the council director and board chair (and other board members involved) to maximize their time together and invite board members to their first board meeting directly following.
2. **Preceding Annual Meeting or Celebration:** This option may work best if you host an annual meeting or celebration at the end of the year (calendar or fiscal). These types of meetings/celebrations serve as a great time to celebrate departing board members and welcome new members.

If a single board member is filling a vacancy more immediately, and not aligned with a cohort, then consider the first suggestion.

**Who Presents:** This is a partnership between the board chair and the council director, not one or the other. It is important for new board members to see the strong relationship between the council director and the board chair. This is often the board member's first introduction to this leadership relationship, and it can positively impact the board member's experience and understanding of roles. Other board officers or members may be included, especially a representative from finance, governance or development.

**How Long:** 60-75 minutes

**What Should be on the Agenda:** Check out the Orientation PowerPoint template for the agenda and example slides and reference the New Board Member Orientation Check List.

**Pre-Work:** Consider requiring that Good to GOTR and GOTR Need to Know be watched prior to the orientation and lead a discussion around some key takeaways (if you do not require Good to GOTR and GOTR Need to Know prior to the orientation, set a requirement deadline to ensure all board members receive the valuable orientation information). Good to GOTR and GOTR Need to Know are both automatically assigned to each new board member within 24 hours of the council director adding and tagging them in Pinwheel. See the Orientation and Onboarding Checklist for more information and instructions.

**Inclusion:** Include name tags or name table tents

#### Onboarding Best Practices



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After a board member is oriented, the ongoing onboarding experience is critical to the successful, engaging, and rewarding board member experience. Check out a few of these best practices shared by councils:

#### **Engagement Opportunities**

- Meet with your committee chair to learn more about the group's priorities and where they are in their work for the year
- Visit a program site
- Participate in coach training
- Attend GOTR 5K event
- Support community outreach event (ie: serve as an ambassador at a tabling event)
- Fill out Individual Fundraising Plan and discuss with board chair, development chair, and/or council director
- Professional development opportunities
  - Be sure to check out the Board Fundamentals 4-Part Webinar Series and Board Fiduciary Responsibilities Training on the GLA to support or enhance the board and board member experience and understanding.

#### **Stay Connected (Board Members Can Try)**

1. Post your exciting news on your social media channels
2. Update LinkedIn to reflect your service
3. Send your network an email about your exciting board service and ways you hope to share more or events you plan to invite them to
4. Connect with your Board Buddy
5. Follow council on social media - [Twitter](#), [Facebook](#), [Instagram](#), [LinkedIn](#)

#### **Elevate Connection (Council Can Try)**

1. Include board members on council website
2. Introduce board members on social media and highlight throughout year
3. Board Buddy program
4. Press releases welcoming new cohort
5. Highlight new board members in council newsletter
6. Create a template email for board members to use to send to their network announcing their board service and what they are excited about
7. Check-in with new board members after first few meetings
8. Host a social gathering before or after a board meeting
9. Share mission moments or GOTR participant inspirational stories at board meetings
10. Start each board meeting with a "get-to-know-you" activity (ask for board members to volunteer to lead these each meeting)



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**Board Buddy:** Board Buddies can make new members feel welcome, connected to their fellow members, and invested in the mission of the organization. Consider pairing veteran board members with new board members for 1:1 support. Not every veteran board member may be interested or needed, but some board members could voluntarily support in this role. This mentorship role could be for the first 6 months – year, or longer if requested. Ultimately, the buddy should be the go-to peer to answer questions, bounce ideas off of, and help explain organizational practices and history. If your council opts to host a Board Buddy program, ensure that the buddies know and understand their expectations.

#### **Ideas for Board Buddies:**

- Call the new board member one week before the orientation and welcome them.
- Sit next to each other at board meetings. If the buddy sits next to the new board member, they can act as a coach - quietly providing additional background information, translating terms and acronyms, and help them navigate through the board materials.
- Follow-up between meetings. Debriefing after meetings is especially important for new board members who may be looking for some additional information, a bit of history, or the perspective that a long-time board member can bring.
- Meet in-person for coffee or lunch within the first 60 days if possible.