

Board Member Onboarding Process

1. Create a Welcome Pack or Handbook

Items to add to your board welcome pack include:

- an overview of the strategic plan
- financial reports, budgets, and projections
- the expectations of board members
- list of committees
- director biographies
- the company bylaws
- board corporate governance guidelines
- forms relating to policies on whistleblowing, confidentiality and conflicts of interest
- recent board meeting minutes and other board materials

2. Create credentials in OnBoard (Board Management Software)

- Username and password
- Access to past, present and future meetings
- Access to resources

3. Announce New Board Member

- press release
- post on social media
- post on website

4. Organize an Informal Welcome Event

- welcome event to introduce new member to other board members.

5. Schedule a One-on-One meeting with President / Executive Director

6. Explain Performance Expectations

- Set clear expectations.
- Have board member sign “Board Member Expectations” form.

7. Assign a mentor from the board

8. Schedule 3 month check in