

New Board Member Onboarding/Orientation Agenda

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Introduction

A thriving nonprofit organization relies on a dynamic board that collaborates with the Executive Director (ED) to achieve its mission and vision. Engaged and informed board members are essential for effective governance and impact. Therefore, a thoughtful onboarding and orientation process for new board members is crucial for building an engaged and inspired board. This assignment outlines a comprehensive step-by-step onboarding agenda for new board members, enhancing their readiness to contribute effectively to the mission, vision, and mandates of the organization.

Overview of an Effective New Board Member Onboarding and Orientation Agenda

	Pre-onboarding/key Information Compilation	Status	Person Responsible/Comments
	Prepare New Board Members Engagement Tool kit		
1	Overview of the organization (Mission, Vision, Structure		
2	Program Impact Reports		
3	Board Member Job Description		
4	Description of the Onboarding and Offboarding Process		
5	Key policies/Procedures (e.g., articles of incorporation, bylaws, operating principles		
6	Current Fiscal Year Operating Budget		
7	Key Talking Points		
8	Calendar of Events		

9	Outreach Materials (Event flyer, Business Cards, brochures)		
10	Needs/ Wish list for board members		
11	Welcome Letter		
12	A personal Phone call from a Board Member		
13	Welcome gift (e.g., name tag, coffee mug, Branded items		
14	Meet and Greet (Social event or organization tour)		
15	Introduce board members to the community (via newsletters, press releases, etc.)		
16	Explore Engagement opportunities		
17	Match new board members with mentors		
18	Encourage board members to share their skills, interests, and availability		
19	One-on-one conversations with Organization Leadership		
20	Complete individual board member engagement form		
21	Establish Expectations		
22	Facilitate a one-on-one/group orientation with senior board/organization leader to Share Mission Moments, illustrating the organization's impact		
23	Review the Strategic plan and ways new members can contribute.		

24	Review the "Board Expectations" agreement form		
25	Dive Deeper: Ongoing Education and Leadership Development		
26	Executive Committee Top Ways to Engage list		
27	Participation in task forces/committees		
28	Leadership development at regular meetings		
29	Explain Conflict of interest policies		
30	Review Organization's assets and liabilities		
31	Address risk management (policies, insurance coverage)		

Things that stood out for me on the New Board Member Onboarding/Orientation

Agenda:

Welcome packets

The minute you invite someone to join your board, you should provide them with your organization's mission, vision, and values statements. Board members should also have access to your nonprofit's bylaws, strategic plans, financial reports, and past board minutes.

Those with little or no history in the organization should also be given other relevant background information on the nonprofit before their first meeting.

2. Board Member Manual

Before the new board member's first meeting, you should also provide a board manual that gives an overview of the board's roles and responsibilities and includes other materials like:

- Governance policies
- Organization's Chart

- Committee structures
- Meeting schedules
- Meeting agenda samples
- Encourage all members to review this manual regularly.

3. Introduction of a new board member to the public

Introducing new board members to the public ensures transparency and accountability. It also helps the community and new board members understand their roles and responsibilities. A public introduction gives board members authority to speak about the organization to donors and increases their effectiveness.

4. Focus on Relationship-building and Networking Opportunities for New Board Members

An orientation session is an excellent way to introduce new members to the staff and the board. It also starts these relationships off on the right foot. When new board members start attending board meetings, you can develop these relationships by providing a mentor and connecting members with key staff and donors to help them achieve their goals.

During their time on the board, you should encourage member participation in events, networking activities, and donor outreach whenever possible.

5. Training of New board members

Training and development activities for your board of directors should not be limited to the board manual. Take every opportunity to enhance board members' skills and knowledge with workshops, seminars, webinars, and conferences.

6. Clarification of committee assignments

Every board member should be a member of at least one committee. It's best to assign members to committees that fit their skill set and give clear expectations on what you need

them to achieve. Committee assignments should include a list of committee responsibilities, meeting schedules, and reporting requirements.

7. Provision of feedback Mechanism

Another crucial part of board member onboarding is feedback. Establish a system to receive feedback from them on their experiences. Provide your board with updates on the nonprofit's progress, challenges, and successes to keep them interested and passionate about the organization. Encourage their input, suggestions, and participation and regularly check in to assess their experience and find concerns and areas for improvement. Use your board members' feedback to update board training material.

8. Sample structure of a board member orientation packet

A board member orientation packet should provide members with a comprehensive overview of the nonprofit and help them understand their role within the organization. Content will vary depending on the nonprofit, but the following structure is an excellent starting point for most organizations.

For each section, the following list items should be included:

1. Welcome letter

Nonprofit board members will be your fiercest advocates. Their passion for your organization should be cultivated and appreciated from the beginning. A warm welcome message from the board chairperson or executive director will start a solid relationship, express your appreciation, and set the tone for your involvement.

2. Organization Overview

The nonprofit's mission, vision, mandates, and values

A brief history of the nonprofit

An organizational chart

Description of beneficiaries

Brief descriptions of programs and services

The nonprofit's recent successes and challenges

3. Governance and board information

Board of Directors roles and responsibilities

Breakdown the responsibilities of your board chairperson and committees

Board meetings schedule and attendance requirements

Board standards – including dress code, emergency information, reimbursement policies, transportation routes, code of conduct or ethics policy, current list of board members and their titles, Bylaws, and Governance Policies, Conflict of Interest policy.

Newsletter, Information about the website, social media, and other communication channels.

4. Strategic plans

An up-to-date strategic plan, Highlighting key priorities and initiatives, Long-term vision, and any upcoming strategic planning processes.

5. Financial and Legal Information

Recent financial reports, including your annual report and audited financial statements

Budgets and financial planning process details, funding sources, and fundraising strategies,

Legal compliance details, including tax-exempt status, registrations, and licenses.

6. Programs and Impact

Descriptions of programs and services, impact reports and infographics, success stories from beneficiaries and donors, and Evaluation processes to assess program effectiveness.

7. Board Policies and Procedures

Recent board meeting agendas and minutes, Process for submitting motions or proposals, Voting and decision-making procedures, Board member terms, elections, and succession planning, and any standard organizational guides you use, such as Robert's rule of order.

8. Key contacts and resources

Contact list for board members and staff, list of critical external partners and collaborators—this includes all individuals and organizations the nonprofit works closely with to achieve its mission, including Major donors, Foundations, Corporations, Government agencies, Local community groups, other nonprofits, Additional contractors, vendors, and consultants, Resources, reports, and, publications regarding the nonprofit and its mission.

9. Training opportunities

List of external training conferences, webinars, and recommended readings

10. Next steps and expectations

This section is tailored to the individual and includes expectations for their board position and the organization as a whole. Every new board member should receive the following:

Orientation dates and details, Required Paperwork, Participation requirements, and mentorship opportunities.

THE BOARD ORIENTATION BINDER

This binder is specifically designed for new board members to take home, review, and engage with. The contents should include: 1. One-Pager History of the Organization 2. Staff Organizational Chart 3. Program Highlights for the Year to Date 4. Board Roles and Responsibilities Guide 5. List of Current Board Members (with professional backgrounds) 6. List of Board Committees and Their Charges 7. List of Upcoming Meetings 8. Calendar of Upcoming Events 9. Any Strategic Planning Documents (executive summary) 10. Approved Budget for the Calendar Year 11. Most Recent Monthly Financials 12. Most Recent Audited Financial Statement 13. Copy of the Organization's By-Laws 14. Fundraising One-Pager

(include board fundraising obligation) 15. Previous Board Meeting Minutes 16. Agenda for the First Board Meeting.

THE BOARD ORIENTATION SESSION

Participants: Chair of the Board, Executive Director, Chair of the Recruitment Committee, Lead Program Director, Lead Development Director.

Facilitator: Chair of the Recruitment Committee.

Agenda (90 minutes).

1. Introductions – share personal motivations and contributions to the organization.
2. Viewing of a recent organizational video or storytelling session.
3. The Executive Director shares the organizational vision and new board members' roles.
4. The Board Chair reviews roles and responsibilities and addresses questions.
5. The Fundraising Staffer discusses fundraising expectations. 6. Overview of the upcoming board meeting agenda and next steps.

Finally, onboarding new board members is a vital process for nonprofits. By hitting the right note from the start, nonprofits can set clear expectations, establish transparency, and build strong relationships with their board members.

My Reflection on the New Board Member Onboarding/Orientation Agenda

Reflection as a Nonprofit Leader Having a structured onboarding and orientation agenda for new board members is foundational for the success of any nonprofit organization. As a nonprofit leader, I recognize that the board is a vital extension of the organization's mission, and it is essential to cultivate a supportive and engaging environment from day one. A comprehensive onboarding process not only empowers new members with the knowledge and tools they need to succeed but also fosters a sense of belonging and connection to the organization's mission. By carefully curating resources, expectations, and opportunities for

engagement, we set the stage for new members to thrive. This commitment to onboarding reflects our deep respect for the critical role board members play in advancing our work and enables them to contribute thoughtfully to governance and strategy. Ultimately, when board members feel connected, informed, and valued, they are more likely to remain engaged and motivated, leading to a stronger, more resilient organization. This onboarding agenda helps transform new board members into passionate advocates and leaders within the organization, undeniably enhancing the collective impact we aspire to achieve.

References

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