



## New Board Member Onboarding Checklist

Pre-Onboarding & Compiling Key Information	Status	Person Responsible/Comments
Prepare New Board Member Engagement Tool Kit		
a. Overview of the organization (vision, mission, structure)		
b. Program impact reports		
c. Board member job description		
d. Description of onboarding & offboarding process		
e. Copy of key policies/procedures (articles of incorporation, bylaws, operating principles, employee handbook, etc.)		
f. Current fiscal year operating budget		
g. Key talking points		
h. Calendar of events		
i. Outreach materials (event flyer, business cards, brochures)		
j. Needs list/wish list that board members can share		
k. Strategic plan		
<b>Welcome of New Board Members</b>		
a. Welcome letter		
b. Personal phone call from board member		
c. Welcome gift (name tag, coffee mug/water bottle, t-shirt, or other item with the organization's branding, etc.)		
d. "Meet and Greet" (social event, coffee, or organization tour)		
e. Introduce board member to the community (via newsletter, press release, social media post, personal introductions, etc.)		
<b>Explore Engagement Opportunities</b>		
a. Match new board members with mentor		
b. Encourage members to share their skills, interests, availability		
c. One-on-one conversations with organization leadership		
d. Complete individual board member engagement form		



Establish Expectations	Status	Person Responsible/Comments
Facilitate a one-on-one or group orientation/conversation with a senior board member/organization leaders to:		
a. Share “Mission Moments” to highlight the heart and impact of the organization		
b. Review the organization’s strategic plan and ways the new member can contribute to successful achievement of the plan		
c. Review “Board Expectations” agreement form.		
<b>DIVE DEEPER: Ongoing Education and Leadership Development</b>		
a. Executive Committee’s “Top Ways to Engage” list		
b. Staff’s “Top Ways to Engage” list		
c. Participation in task forces/committees		
d. “Leadership Development” at regular board meetings		
e. Explain conflict of interest policies/procedures		
f. Review organization assets and liabilities		
g. Address risk management (policies, insurance coverage, etc.)		
<p><i>*Quick Tip: The “onboarding” or “orientation” process should not be a one-day event. Ongoing education and support are key components of a successful onboarding process!</i></p> <p>Put It Into Practice:</p> <p>At your next meeting, ask ALL board members to respond to the following two prompts on an index card. Collect their responses and schedule 5-10 minutes at each of your regular board meetings to tackle one of the proposed questions/topics.</p> <p>1. What can organization leaders do to help you feel more equipped as a board member?</p> <p>2. What topic, information, staff member, or program would you like to engage with at an upcoming board meeting?</p>		