

Onboarding a New Board Member

While the learning curve for a newly appointed board member can be quite steep, there is much that a board can do to support this transition. In fact, proactive steps can significantly shorten the transition from a “newbie” to a productive, contributing board member.

There are a variety of ways for boards to facilitate this transition. Choose those from the list below that fit your organization’s situation and culture.

1. Invite the prospective board member to attend a board meeting as a guest prior to officially beginning their term.
2. Assign a mentor. Assigning an experienced board member to serve as a mentor to the new board member for two years is a good practice. This assignment is usually the responsibility of a Governance Committee; in the absence of a Governance Committee, the board chair may make the assignment. The mentor should be available to meet briefly with the new board member after a board meeting to answer questions and periodically between board meetings to provide additional opportunities for interaction.
3. A new board member orientation that is planned and led by the board. At least two board members should participate in the orientation process to review key aspects of bylaws, how the board functions including its philosophy of governance and provide helpful background on the organization and board processes. The orientation will include input from key staff members.
4. Provide a copy of the board member job description. (This would have been reviewed during the recruitment process.)
5. Provide a Board resource book that includes:
 - Articles of Incorporation
 - Bylaws
 - List of current board members and their terms
 - Board profile
 - Board and committee minutes for the prior two years.
 - Organizational chart
 - Strategic plan
 - Board policies such as
 - a. CEO Performance Review
 - b. Conflict of Interest
 - c. New Board Member Orientation
 - d. Non-Discrimination

- e. Board Member Continuing Education
 - f. CEO Succession Plan (Short Term and Longer Term)
- Commonly used acronyms
 - Most recent board self-assessment
 - Books or papers describing the history of the organization
6. Engage a facilitator to review the last 20-25 years of the organization's journey. This review might include identifying the challenges, accomplishments, key events, board and CEO transitions on a timeline. Reflecting on how the board functioned during those periods can be helpful for both new and more experienced board members.
 7. Identify Educational Needs. Meet with the new board member within the first six months in order to identify additional information or education that might be useful.
 8. Provide an end-of-first-year review. Boards with active Governance Committees may include evaluation of individual board members as a part of their responsibilities. While these evaluations typically take place near the end of a term, an evaluation of the first year of a board member's first term can be particularly helpful. This may include an opportunity for the board member to ask questions, describe how they see their adjustment to the board, etc.
 9. Within the first year, plan a social event for board members and possibly spouses.

Your feedback is welcomed. If you have questions or comments about any of these ideas or if you have additional suggestions, please contact us at info@mhsonline.org.

By LaVern Yutzy, MHS Consulting Associate
© Copyright 2014 by MHS Alliance