



Onboarding Tools

STEP 4: Onboard Intentionally

Now that you have found the best candidate for your board, the real work begins! Recruitment is the gateway, but onboarding is when the board member learns about board nuance, culture, and how things work behind-the-scenes. The onboarding process is not a one-time occurrence, rather, it is ongoing and dynamic. The checklist below will guide you through one potential onboarding process to support your new board member (you can adjust the checklist as needed to fit your particular board).

New Board Member Onboarding Checklist

The responsibility of getting up to speed in the boardroom is often shouldered by the new director; yet, the company and existing board members can (and should) provide the insights and tools to make the process more efficient, productive and rewarding. These steps are meant to highlight the obstacles and offer straight-forward strategies to help onboard new board members. This is not a one-time task: follow these strategies for a minimum of one fiscal year.

Consider following these steps:

- Provide context.** Brief the new member on the company strategy and the legal and administrative duties and responsibilities before their first board meeting. Give them access to prior board materials. Brief them on current focus areas, especially for the committees to which they are assigned.
- Make strategic committee assignments.** Assign the new director to a committee where they will connect with the most influential board members and bring their unique insights to support the future success of the company.
- Assign a mentor or board buddy.** Focus on the board culture, dynamics, and informal processes. This can include protocols for making requests and establish context such as personalities, how directors interact with one another, and expectations. The mentor can also act as an ally and amplify the new director's voice in discussions when others inadvertently ignore, interrupt, or unduly criticize them, as can happen when someone is new to the group.
- Create social activities and opportunities to form a bond.** Consider ice-breaker exercises, board dinners, and other ways to on-ramp the new director and help all to build bonds with one another. Check in with the new board member to ensure the activities make them feel included; they may have religious, dietary or preferential concerns that make some activities difficult to join.

- **Create norms to make room for their insights and feedback.** Focus on strong facilitation of group discussions to ensure there is room for all to contribute to the conversation.
- **Check in and give feedback.** Periodically ask, “How else can I help you be most effective?” Give them clear, specific feedback on what they are doing well. And suggest ways they can become more effective, including ongoing education such as seminars, email lists to join or books to read, how to listen and observe patterns, and ways to better contribute in conversations.