

Onboarding

Strategic Onboarding of New Board Members

Overview

Onboarding is a process of orienting newly selected members to the board with the end goal that every new board member feels engaged, ready to effectively contribute his/her skills, and rewarded by the board experience. Boards frequently underestimate the importance of onboarding new members; instead, new members are carelessly added to board meetings, barely getting an introduction to their new colleagues around the table. New members are often confused about what their role entails, how they fit into the work, and how they can make an impact. The board's governance committee is responsible for selecting and onboarding new members (ideally involving the school leader), and they must capitalize on this **important opportunity to cultivate and fully utilize new members, strategically engaging them in the work of the board.**

A strategic onboarding process achieves the following:

- › Educates board members on the mission, history, results, successes, and challenges of the school and its board
- › Motivates and inspires new members to fully commit to being active and productive
- › Identifies specific ways each board member can positively impact the board and school
- › Shares the norms, policies, and practices of the board

Every onboarding process should have an [Orientation Training](#) and each new member should receive a [Board of Directors Manual](#).

Orientation Training

The governance committee typically plans and executes orientation for new board members immediately after the individual is voted onto the board. This orientation gives new (and old) board members information they need to be successful and provides the opportunity to begin relationships with other board members, a critical feature of highly effective boards.



There are many ways to orient new board members, for example: a session during the school day that combines board discussion with classroom visits; a dinner at a board member's home or local restaurant; or a downtown lunch that includes onboarding objectives.

When developing the agenda for board orientation, poll current board members and ask, “What do you know now that wish you had known when you first joined the board?” Use the responses as a guide for your agenda.

A sample onboarding training session could include:

- › **Introductions and time for socializing.** At the first board meeting with the new members, take time to introduce those around the table and provide name cards so new members can quickly learn names. Each current board member can share their own length of board service, and his/her personal story (interest in education, professional interests, etc.) including how he/she came to serve on the board.
- › **Overview of the mission, vision, and educational goals of the charter school.** The school leader might talk about the school's founding, programs, and success; students and families; and key stakeholders.
- › **Responsibilities of board members and committees.** Clearly state the board's policy on attendance at meetings, whether attending by phone is permitted or discouraged, and requirements for board member committee participation. See CBP's [Board Member Agreements](#) tool for additional guidance.
- › **Long-term school goals, organizational priorities, and strategic plans.** Include background information on key recent board decisions and those on the horizon.
- › **Finances and fundraising.** Overall financial situation of the school and fundraising expectations, including whether the board has a “give/get” policy, requiring board members to either contribute a specified amount of money or raise it from others, or expectations for each board member to give at a personally meaningful level.
- › **Cultural aspects of the board.** Discuss logistics for meetings (e.g., attire, whether food is provided), behavioral norms, and expected responsiveness to email communication.
- › **Data collection.** Orientation is a good time to make sure you have all contact information for new and current members and availability for meetings.



Board Mentor

Assign each new board member a mentor or “buddy” who has served on the board long enough to offer support. This person can be the first point of contact to answer questions after orientation and can help the new member navigate any issues that may arise. Assigning this role to a different board member for each new board member reduces the burden on the board and governance chairs, helps build relationships across the board, and highlights the importance of onboarding new members.

Board of Directors Manual

The board of directors manual gives new board members the critical documents they need to build their knowledge of the school and familiarity with the board. It does not matter whether the manual is printed in a binder or loaded into a password-protected online board portal, as long as there is *one* place where all relevant documents and materials can be accessed by any board member at any time. This manual should serve as the backbone for all orientation trainings, the archive for all critical documents, and a recruiting tool for future board members.

The governance committee must keep this manual and all board documentation current for both compliance and convenience. It is immensely helpful for busy board members to have one place to find all board materials and information that is clearly organized and up to date. Charter school boards are often surprised when the authorizer, funder, etc. requests certain materials (e.g., minutes, contracts, records) and collecting these documents retroactively is time consuming and likely frustrating (not to mention out of compliance). The governance committee chair should provide each new board member with the board manual a week before orientation begins to serve as the foundation for onboarding.

Checklist for the Board of Directors Manual

BOARD MEMBERS

- Names, contact information, offices held (treasurer, secretary, etc.), term lengths, and short bios for each current board member
- Contact information and short bio for the school leader
- Lists of committees and the chair for each, including contact information for any non-board members



CALENDAR

- › Board and committee meetings
- › School events board members can or should to attend such as performances, demonstrations, or portfolio evaluations
- › Key dates and milestones of all board and committee goals

JOB DESCRIPTIONS

- › The full board
- › Officers
- › Individual board members
- › Committees
- › School leader and leadership team

SCHOOL INFORMATION

- › School charter
- › Mission, vision, and values
- › Short history of the school—how, why, and when it was founded; results to date; and any events of significance
- › Short description of the school’s program
- › Description of the students served: demographic information on poverty and English Language Learners; residential information; and other descriptive information about the student population
- › Summary of student performance data: high-stakes test scores over the last several years, authorizer performance reports/ratings, relevant academic reports to the board
- › School’s strategic plan
- › Organizational chart
- › Most recent annual report
- › News articles about the school, the city’s and state’s charter sector, and relevant political events

FINANCE AND FUNDRAISING INFORMATION

- › Financial reports, including most current and previous six months



- › Most recent independent audit report
- › Budget for the current year and previous one to three years
- › Long-range financial plan
- › Names and contact information for current funders

MANAGEMENT DOCUMENTS

- › Documents that detail relationship with a charter management organization (CMO) or education management organization (EMO), if your school contracts with one
- › Contracts, reports, milestones, and any other documents relevant to the CMO/EMO or significant outside vendors

LEGAL AND POLICY DOCUMENTS

- › Articles of incorporation, bylaws, policies (conflict of interest, confidentiality, student discipline, etc.), and Internal Revenue Service Form 990: Return of Organization Exempt from Income Tax
- › All legally required documents including meeting minutes¹
- › Insurance information that includes a copy of the school's certificate for the Directors' and Officers' Liability insurance

GOVERNANCE RESOURCES

- › Charter Board Partners offers resources through our [GreatBoards](#) portal, accessible on [our website](#), organized around our [Standards for Effective Charter School Governance](#); these resources include tools and templates to support boards in reaching the standards that you can keep in your manual for reference.

Onboarding Matters

Onboarding is an essential part of cultivating a truly effective board. By taking the time to develop a comprehensive manual, thoughtfully design a training process, and purposefully match newcomers with mentors, you are setting your board up for success. Boards function most effectively when everyone feels prepared and inspired to contribute in ways that are meaningful and fulfilling.



¹ We recommend including minutes from the previous six meetings
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