ORIENTATION AND ONBOARDING NEW BOARD MEMBERS

Bringing new board members up to speed, while integrating them into the existing leadership structure, is essential to managing turnover effectively. Use this document as a guide to onboard new members.

ORIENTATION AND ONBOARDING

The orientation and onboarding process is meant to familiarize new board members with the local board structure and UChicago Alumni Association policies.

Goals of new board member orientation:

- Share knowledge about the board to shorten the learning curve of new members.
- Avoid future frustrations and disappointments by setting expectations from the start.
- Increase enthusiasm and motivation for the existing board.

ESTABLISH AN ORIENTATION AND ONBOARDING STRATEGY

Orientation strategy should include but not limited to the following:

1. A clear orientation timeline from invitation to first board meeting.
2. An orientation guide including all relevant documents and contacts.
3. An orientation session that provides opportunities for discussion, clarification, and questions.
4. An onboarding plan that ensures full integration of new board members into board culture.

1. Sample of an orientation timeline

1.5 months prior to term start date (mid-May)

- Send formal invitations to newly elected members to join the board; allow two weeks for a response.
- Once a response is received, send a welcome letter from president.
- After the president’s letter, send a welcome letter from the staff liaison.
- Set dates for new member orientation sessions. Determine if session will be face to face, conference call or webinar.
1 month prior to term start date (June)

- Send new member dates for orientation sessions via webinar.
- Discuss among current members who will best match as mentors for new members.
- Circulate mentor welcome script and expectations to board members chosen to be mentors.
- New mentors to make welcome call their mentees.

Term starting month (July)

- Send the orientation manual to new members.
- Review results from welcome calls, ensure all follow-up is handled.
- Host orientation webinar for new members, one afternoon and one evening session.

First board meeting (Autumn)

- Hold a gathering just prior to the start of first meeting for networking and getting to know one another.

2. Orientation guide

An orientation guide is to be a resource for new board members should consist of essential documents and may include any of all of the following:

- Overview of the board history and work
- Board member expectations
- Meeting schedule and attendance expectations
- Organization structure
- Roles and responsibilities of committee chairs and members
- Membership roster that includes, photos, term lengths, and contact list
- By-laws (if applicable)
- Most recent board minutes
- Alumni Association information such as mission statement, University priorities, campaign information, board philanthropic participation, UChicago facts and figures, local demographics, signature events and dates, list of social media sites and email lists to join, and a description of the working relationship with Alumni Association staff support.

3. Orientation session

The orientation training session should connect all new board members as soon as possible after they are voted in.

- Recommended structure
  - Face to face is optimal
  - Conference call, one afternoon and one evening session.
  - Webinar, one afternoon and one evening session.
• Recommended components
  ▪ Welcome by president and introductions of new members
  ▪ Board goals
  ▪ Introduction to committee work
  ▪ Time for Q&A
  ▪ Networking, if applicable

4. Onboarding plan

Continuous integration of new board members into the board culture.

• Send public announcement of new members to the alumni community.
• Hold social gatherings to introduce the new members to volunteers.
• Continue mentoring program, holding 1:1 meetings or calls with mentors and new members.
• Involve new members immediately by assigning them to (or having them choose) committees.
• Connect new members with the staff liaison.
• Give an official welcome and introduction at the first meeting.