

# BOARD ONBOARDING

## WHAT'S BOARD ONBOARDING?

Board onboarding is the formal or informal way to get new board members up-to-speed, engaged, and contributing as early as possible to the board's governance and to the organization's mission.

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The onboarding process starts before new members are selected. It begins with their recruitment and application for the board position. Then, there's the actual orientation process. Finally, an evaluation of the overall onboarding process should happen a few months after the new members have started their position.

## PROBLEMS THAT HAPPEN WHEN THERE'S NO PROPER ONBOARDING PROCEDURE

It's already hard for sport organizations to find quality board members. Poor onboarding procedures hurt organizations even more. Some problems include:

### ► DISENGAGEMENT

New members can feel lost joining an established board team because everyone else is familiar with one another and knows what's what. Without proper onboarding, the new members can lose interest and disengage rapidly. In such instances, new board members don't contribute to the board or organisation as much as they should or could.

### ► BREACHES TO CODES OF CONDUCT OR ETHICS

Without proper training or onboarding, new board members may unknowingly infringe on the organization's code of conduct or ethics. This infringement may have severe consequences or liabilities for the organization.

### ► AMBIGUITY OF ROLES AND RESPONSIBILITIES

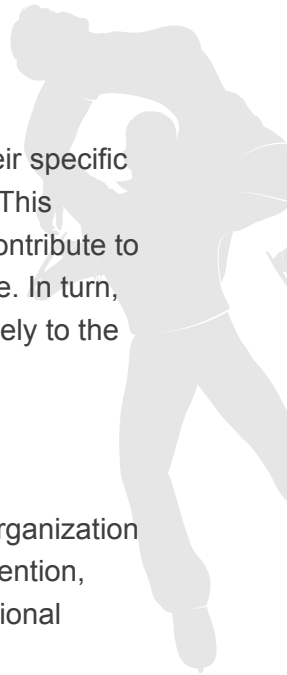
New members may be unclear as to their specific roles and responsibilities on the board. This leaves them wondering how they can contribute to the board's functioning and performance. In turn, this means they can't contribute effectively to the organization's success.

### ► TURNOVER

If engagement isn't fostered, then the organization may lose the board member (lack of retention, higher turnover). This differs from intentional turnover to refresh board membership.

### BY THE END OF THE END OF ONBOARDING, NEW MEMBERS SHOULD UNDERSTAND:

- ✓ The organization's mission, vision, and values
- ✓ The challenges and opportunities the organization faces
- ✓ The key stakeholders and relationships
- ✓ The roles and responsibilities of the board versus those of the staff
- ✓ Their roles and responsibilities as a board member
- ✓ Other board members' roles, responsibilities, skills, knowledge, backgrounds and experience
- ✓ Board procedures (for example, how meetings are run) and policies (for example, codes of conduct and ethics) as well as any particularities (for example, culture) that differentiate this board from others



# BEST PRACTICES AND RECOMMENDATIONS FOR EFFECTIVE ONBOARDING

To improve the chances of succeeding at board onboarding, sport organizations should consider a 3-step process. Step 1 covers board member recruitment, application, and selection. Step 2 is new member orientation and step 3 is onboarding evaluation (see Figure 1).

## ▶ STEP 1

### BOARD MEMBER RECRUITMENT, APPLICATION, AND SELECTION

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- Have a formal onboarding process to ease the new member's transition onto the board, thereby setting up the board and organization for success.
- Have a governance or nomination committee oversee the selection process for new members.
- To find new board members, consider your volunteers, donors, key partners, academics, and even the broader sport or business community.
- Throughout this step, consider:
  - o The applicant's expertise and skills, focusing on those which would be particularly valuable for the board or organization to function properly
  - o The challenges and upcoming projects or opportunities for the organization as a whole
  - o Offering information early (during the recruitment process) about the potential member's roles and responsibilities as a board member and the time commitment that would be required of them

## ▶ STEP 2

### NEW MEMBER ORIENTATION

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- After selecting board members, their orientation should include one or more **special meetings** to let new members:
  - o Obtain a board manual
  - o Meet the board chair and CEO or Executive Director to learn about the board's role, decision-making processes, meeting procedures, board culture and practices, board-staff relationship, the staff's responsibilities, key stakeholders and relationships, strategic priorities and goals, and upcoming major projects and initiatives
  - o For members less comfortable with the financial and budgeting side, consider a meeting with the Chief Financial Officer, Treasurer or other individual in charge of budgeting for an overview of finance-related key principles and processes
  - o Meet the other board members (a get-to-know-you session) and get set up with a mentor (a more senior member of the board)

- Consider having the new member sign a **board member agreement or contract** that spells out the member's responsibilities to the organization and the organization's responsibilities to the member. This agreement should also consider the organization's code of conduct, ethics and potential conflicts of interests.
- Depending on the extent of information in the board manual, the new member may wish to conduct their own additional **self-directed research** about the organization or sport. For example, reviewing the organization's website, consulting the organization's newsletters or accessing news articles. Such research can further develop the new member's understanding of the organization and the sport.

#### THE BOARD MANUAL OR BINDER SHOULD INCLUDE:

- ✓ Values
- ✓ Organizational constitution and by-laws
- ✓ List of abbreviations or acronyms commonly used by the board and organization
- ✓ Board member job description
- ✓ Board chair job description
- ✓ CEO or Executive Director job description
- ✓ Board member biographies
- ✓ Board meeting calendar
- ✓ Board meeting processes
- ✓ Codes of conduct and ethics
- ✓ Committee list and descriptions
- ✓ Board terms of reference
- ✓ Organization's current strategic plan
- ✓ Previous year's annual report and audited financial statements as well as current budget
- ✓ Organizational chart
- ✓ Recent board meeting agendas and minutes
- ✓ Relevant policies like those for public relations, media (including social media), travel and reimbursement
- ✓ List of government laws or other policies relevant to the organization
- ✓ Sport-specific information (for example, sport disciplines, rules, culture, competition format)
- ✓ Details about key partners and stakeholders (for example, sport government authorities) and context (for example, national versus provincial or territorial versus community)

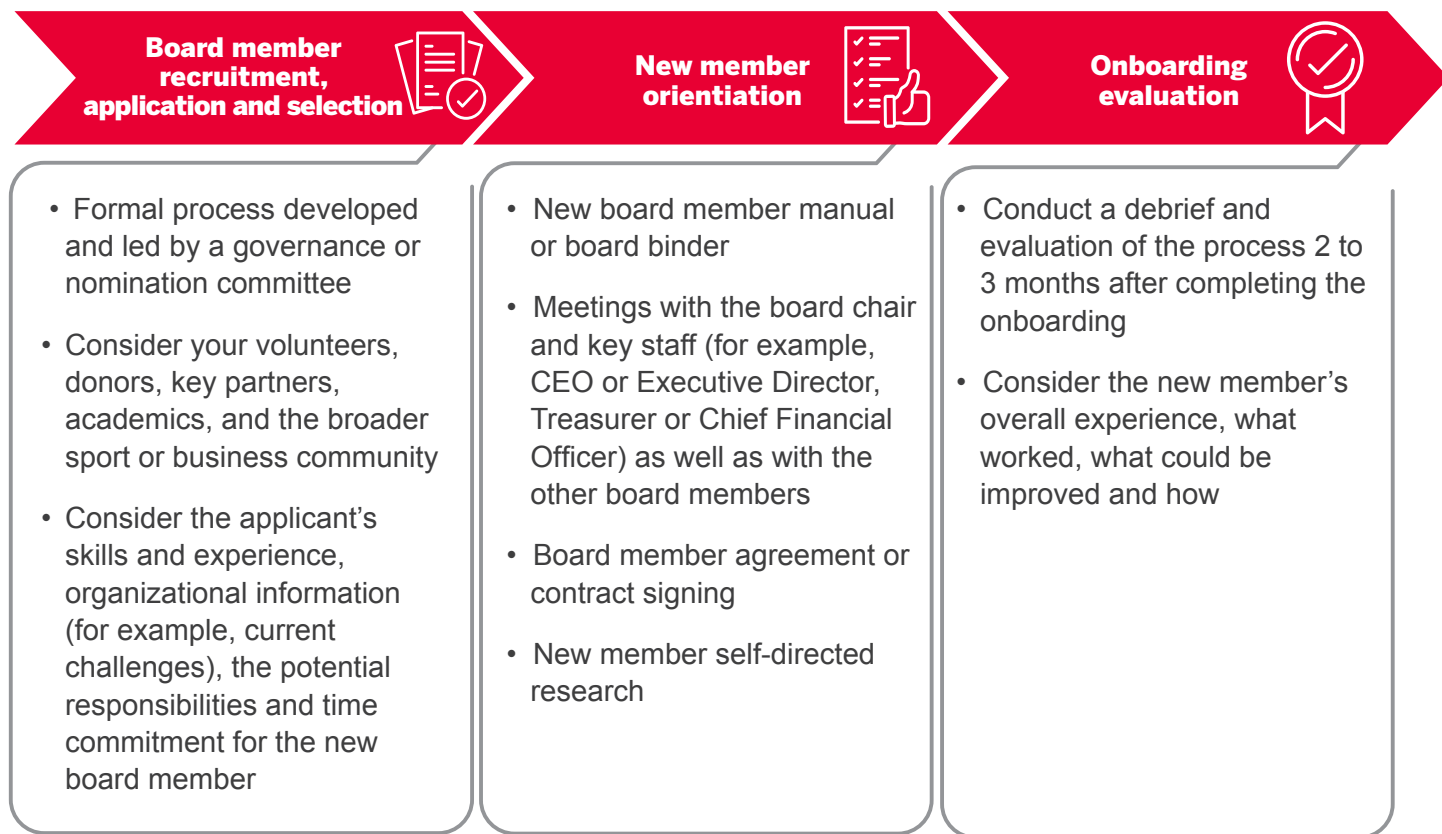
### ► STEP 3 ONBOARDING EVALUATION



- About 2 to 3 months after onboarding, the board chair should follow up with the new member for a debrief on and evaluation of the onboarding process (their experience, what worked, what could be improved). In this way, the board can learn how the process may be improved for the next time the board selects new members.



Figure 1. New board member onboarding process



**A proper onboarding process for new board members deepens understanding of roles and responsibilities, fosters deeper engagement, helps respect the codes of conduct and ethics, and boosts the likelihood of retaining board members.**



*This report was prepared for SIRC by Milena M. Parent and Erik L. Lachance.*

## Key resources for further reading on board composition

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