
Board Onboarding Process

March 27, 2021

Background

In 2020, [Code for Science & Society](#) (CS&S) and [Invest in Open Infrastructure](#) (IOI) engaged [DeEtta Jones & Associates](#) (DJA) to develop a set of best practices for board governance, including documents supporting board nomination and onboarding, as well as broad best practices.

The following board onboarding process reflects explicit expectations for centering equity, diversity, inclusion and anti-racism (EDIAR) in all systems, roles, and practices of an organization. The specific approach is informed by the DJA Team’s research on best practices; experience with board dynamics and EDIAR; and focus groups with CS&S board members.

For purposes of application and implementation with the context of a board onboarding process, working definitions of EDIAR are provided.

Equity	The degree to which boards are free from historic and present-day barriers to full access and participation.
Diversity	The extent to which representation among board members reflects the diversity of identities being served and/or desired to serve, including future and aspirational relationships.
Inclusion	The ability of all members to bring their full potential, identities, perspectives, and skills to their service in a way that adds value to the mission of the organization, is affirming to the individual, and builds capacity within the board.
Anti-Racism	Interrogation of legacy processes and practices to identify and mitigate ingrained racism, whether implicit or explicit, and replace them with equity-based alternatives.

Philosophy

Onboarding orients and acculturates new board members to essential skills, knowledge, and behaviors that enable them to serve to the best of their ability. Onboarding should be an interactive series of formal and informal experiences, where new board members are made to feel welcome and encouraged to ask questions and fully engage with other members until they develop confidence and competence associated with five areas:

- *Clarity* around roles, expectations, operations, policies, and sources of support
- *Connection* between members through communication and interpersonal relationships

- *Culture* demonstrated through the board's values, norms, attitudes, and beliefs
- *Contribution* strategies which result in influencing decisions, impacting outcomes, and solving problems
- *Climate* reveals what is most important, urgent, challenging, exciting, etc. to the board

Onboarding is ultimately about setting up new board members for short-term and long-term success. Personalizing the onboarding experience to account for an individual's expertise, interests, and background underlines the board's intent to empower, not assimilate, their new board members. This is a key aspect of inclusive and anti-racist practice.

Recommended Board Onboarding Process

The following process is structured to enable new and continuing board members to form a shared EDIAR culture, practices and direction. We've divided up the process into four phases:

1. During the nomination process
2. Upon confirmation
3. Initial meetings
4. Reaching steady state

Intentional and carefully structured onboarding is essential for embedding EDIAR in a board's DNA. It is not only a first-meeting activity. The groundwork is laid during the nomination process, it carries through confirmation and initial meetings, and continues for up to a year following confirmation. Planning for this long-term effort will allow all members to accelerate their work together with consideration for their time and experience.

During the nomination process

Lay some groundwork on the nature of the board's work during the potential board member's interview. Clearly, nothing confidential should be shared until the member is confirmed, but what *can* be shared will help to inform the nominee's interest and begin orienting them expectations.

- Deal directly and proactively with issues of money.
Have and be willing to share the compensation and/or benefits associated with board membership. Remember that a lot of BIPOC and people from countries or with experiences that are currently underrepresented on the board are highly sought after and often overcommitted. Compensation for labor signals a genuine regard for people's contribution and creates access for some who otherwise would not be able to serve in a volunteer capacity.
- Be clear about expectations of board membership.
If there are financial contributions and/or fundraising expectations of board members, share those at this stage. If specific amounts are known, disclose them. Talk with potential members about meeting frequency, expectations for attendance and participation, and the level and types of effort that is

required in addition to meetings. Transparency about expectations will help both parties have a clearer understanding about whether or not board membership is feasible, or surface areas for making adjustments to expectations in order to create additional pathways to board engagement.

- Discuss the work of the board.
What are the major priorities of the organization? What are the major initiatives? What work is expected from the board in the short and long term? Does the workload follow a certain cycle during the year? All of this information will help the potential member imagine themselves in the organization and will set a realistic expectation for the work ahead.
- Ask about the candidate's priorities.
What will they bring to the work? What values inform their work? What lived experiences will they contribute? What do they need to perform at their best? This sort of information will help you be prepared to support and empower them as they join the board.
- Explicitly talking about the board's commitment to centering EDIAR values and practices sets an expectation for potential new members and weeds out people whose values are not aligned. Also, centering the candidate's experience will help in making an evaluation and bring to light additional support to be offered in onboarding.

EDIAR Lens: A desire to increase diverse representation on a board means committing to removing barriers to access for people who have not traditionally been considered or able to participate. Three of the primary barriers are 1) previous board experience, 2) ability to meet time and/or financial contribution expectations, and 3) being overextended due to frequency of requests. Willingness to create alternative models for considering membership and deal directly with issues of financial compensation and/or giving levels are essential for breaking barriers to access.

Upon confirmation

A flurry of activity follows a new board member's confirmation. Take care not to overwhelm the new member: progressive engagement and disclosure are key. Withholding information is not suggested, however: prioritize what the new member needs to know and do right away, and also make accessible deeper details as they need them.

In preparation, the board and management should prepare a comprehensive and digestible onboarding packet. This packet should include an executive summary of major issues of which to be aware, along with organized access to relevant documents and background information. Contents might include:

- Ongoing projects (and crises, if any), status, and upcoming board actions
- Specific roles and responsibilities of the board, along with CVs, bios, social media accounts, etc. for other board members.
- Recent annual reports and meeting minutes

- Recent board actions (within the past year or so), their implementation to date, and outstanding items
- Priorities for the coming years and expected progress in the short and long term
- Financial data, including financial statements, budgets, cash flow, projections, high-level summary of outstanding AP/AR if relevant, recent 990s, and upcoming board actions
- Staffing information, including an organizational chart, roles and responsibilities, general point of contact, and for subcommittees, vacancies and existing plans to fill them, and known upcoming staff changes
- Operational information, such as board policies and procedures, governing documents, communication methods, and meeting schedules
- Board procedural and/or behavioral norms, including code of conduct
- Definitions of acronyms and jargon: whatever might be confusing for someone new to the table

The goal for the packet is to give the member quick access to core information they need right away, and knowledge of where to find deeper information as needed. Carefully consider what is most important before the first board meeting, what will be used during the first 90 days, and what can wait until later.

Additionally, there will be a number of key introduction and logistic elements to begin as soon as possible:

- Invite new members to the methods the board uses to communicate (messaging platforms, listservs, wikis, etc.)
- Introduce new members to the board and encourage all members to introduce themselves and welcome the new members.
- Explicitly invite questions and discussion early on, and ensure that questions are answered.
- Send a questionnaire and ask for preferred names, pronouns, local time zone, accessibility needs, experience level and support needed with communication and productivity tools/platforms, and religious, personal, or regional holidays/dates they observe
 - Also do this for continuing members if you haven't yet!
 - Request permission to share information shared with the entire board and obtain consent before sharing
- Share the contact information for the point of contact who handles scheduling, technical, or other administrative support
- Request a headshot photograph, along with a short bio, to be featured on your website, social media accounts, or presentations. Expressly include an option for members to opt out of certain types, levels or ways of sharing information about themselves.
- Identify and connect new members with an onboarding partner, a seasoned board member who commits to helping with acclimation.

In getting to know the culture of the board, it will be crucial for new members to have mentoring and informal discussions. Arrange for informal conversations to take place between each new member and one or two continuing member in advance of the first formal board meeting. At these conversations, the continuing members can share their experiences and learn from the experiences that the new member brings as well.

Ensure that members who have not served on boards before have the opportunity to get to know the language, dialogue, and assumptions of board and industry culture. For example, someone without non-profit experience may not be familiar with what a 990 is and what information is reported in it. As part of the orientation, board packet, and initial meetings spend a little extra time making explicit what certain terms and practices mean.

In preparation for the first board meetings that new members will attend:

- Communicate early about scheduling the first meeting, and identify which web conferencing applications will be used (e.g., WebEx, Zoom, GoToMeeting, etc.)
- Set clear expectations for what needs to be prepared and completed before the first meeting
- Check-in and confirm the details of the first meeting a couple of days ahead of time

EDIAR Lens: Underrepresented board members will likely have a number of similar requests on their time, so anything you can do to make their entrance smoother will allow them to focus on their actual contribution. By introducing cultural elements, expectations, and processes, you enhance inclusion for board members who are not steeped in board culture. An onboarding partner should be equipped with an onboarding checklist. Remember, they too are volunteers, so equip them with clear guidance as they welcome, answer questions, and help a new member experience an authentic sense of belonging and contribution.

Initial meetings

The first meeting that new board members attend will be a crucial moment in setting the tone for the new collective board. While there is certainly a lot of ongoing work, this is a perfect opportunity to revisit norms, discuss how the board works together, and build team cohesion.

Here are a few ideas for how you might spend time during the first meeting:

- Introductions:
 - Names and/or preferred names
 - Actively encourage all members to practice pronouncing each other's names accurately.
 - Pronouns (optional)
 - Why not required? Not everyone may be in a position to share. For example, some people whose gender is different from that assigned at birth may not be comfortable sharing this fact with the group yet. At the same time, normalizing pronoun sharing for those comfortable is an excellent inclusive choice.
 - Location
 - Background (career path, networks, affiliations, research areas, lived experiences, etc.)
 - Interests and passions (community work, hobbies, initiatives, etc.)
 - A fact that isn't related to professional pursuits
- Community agreements:

- Community agreements are the expectations the group has for each other, and the standards they hold themselves to. AORTA, the Anti-Oppression Resource and Training Alliance, has an excellent set of examples in their [Anti-Oppressive Facilitation Guide](#).
- Share 3-5 examples (e.g., No one knows everything; Together we know a lot)
- Invite feedback and questions
- Ask members to contribute additional agreements for the group
- Confirm commitment and adherence to final list
- Make the final list easily available during future meetings, and discuss it often.
- Dedicate time with the full board to welcome new members and do some collaborative norming: examples might include
 - Group norms (e.g., We use a participatory method to generate meeting agendas)
 - Practices (e.g., we start our meetings five minutes past the scheduled kick-off time; if you're going to be late to a meeting, please notify entire board ASAP)
 - Values (e.g., Diversity: we believe differences make us smarter, stronger, and more agile)
 - Definitions: what does *anti-racism* and other EDIAR values mean to the board? How will you know that you're exhibiting those values? What will they look like to the rest of the organization?
 - Decision Making: how does the board make participatory decisions, and how does it transition from discussion to action? Who is consulted, and who makes the final call?
- Set intentions for the newly formed board and model behaviors to:
 - Make space for new ideas and be open to other ways of doing things
 - Stay on-topic and acknowledge off-topic comments in a Parking Lot document
 - Balance inquiry and advocacy in service of productive conversations
 - Build a culture of virtuous feedback cycles in which board members express specific appreciation for each other's contributions and service, as well as communicate clearly about actions that need to change in the future.
 - Incorporate many ways of participating, through synchronous and asynchronous methods.
- Share the skill sets that different members have, plan for ways to use their strengths strategically, and consider options to fill gaps
- Clarify projects that need to be prioritized and offer context about why they are important
- After the first meeting, follow up with an email to new members:
 - Ask for comments or questions about the first meeting
 - Share overview of their onboarding plan for the next year, along with check-in points
 - Set up optional, introductory 1:1 meetings between new and returning board members

Of course, you will also want to spend time during this first meeting or two discussing some of the content from the onboarding packet, particularly current and upcoming board priorities. Plan for extra time to discuss the background: this is a key moment to slow down in order to get your new members fully up to speed. This is also a great opportunity to discuss the culture of the board: why are things the way they are, and who does the board want to become together?

EDIAR Lens:

At an individual level, board members must model what challenging implicit and explicit bias looks like to new board members. These biases are expressed through interpersonal behaviors that appear quite innocuous and typical of how new people join an established group (e.g., connecting and showing enthusiasm over similarities, or confirming ideas that cause the least amount of disruption to the group). However, if these behaviors aren't checked towards the beginning of the onboarding experience, then new board members may not feel comfortable sharing their honest feedback and positively advancing the board's work.

Reaching steady state

Onboarding does not stop after the first meeting. Realistically, it will span a minimum of 9-12 months. In any new situation, people tend to worry that they are not learning the ropes quickly enough. Support your new board members by recognizing up-front that onboarding is a process that will take time.

Furthermore, this phase is ideal for the board collectively to learn from new members. Inclusive onboarding makes space for the board to grow and change in the same way that new members grow and change.

Some practices during this phase:

- Continue to share opportunities for norming; revisit norms from past meetings and reflect on their meaning and relevance among new members
- Explain how the board assesses its progress towards goals (e.g., qualitative and quantitative methods, tools, and criteria)
- Create a mid-point set of onboarding benchmarks, which may include a checklist of expectations and competencies.
- Encourage new members to connect with each other outside of the board's regular meetings. This will help them build cohesion and mutual support.
- Tailor the onboarding experience by building in opportunities for new board members to participate in elements of the board's work that match their interests and backgrounds.
- Establish confidential feedback channels between new board members and the board chairs; new members should be asked about their needs, and if they've experienced bias or marginalization from any of the board members or board affiliates.
 - These channels should also be made available to continuing board members.
- Remind returning board members to reach out to new board members on occasion to offer words of encouragement, appreciation for their insights and actions, opportunities to collaborate, etc.
- Coordinate an informal mentor/protege pairing between new members and returning members.
- Continue to make introductions between new members and the board's network of partners, collaborators, investors, advocates, etc.
- Solicit feedback from new members about their onboarding experience. The best prompts are specific and limited: "What worked best for you about the budgeting process?" as opposed to "How's it going

so far?” Alternatively, evaluate their onboarding experience through a survey or interview at the end of their first year of service.

- Incorporate new members’ feedback into refinements of the nomination and onboarding process, and let them know how their feedback influenced the process for the better.
- In the next cycle of new member onboarding, encourage the last cohort to serve as mentors for the new cohort if their time allows.

EDIAR Lens:

Inclusion is a moving target, and commitment to this value must be consistently affirmed at meetings throughout the year. Recurring discussions to connect the board’s EDIAR values with its goals takes time, a precious resource, and signals its significance to the organization. Board members should have an opportunity to raise questions about EDIAR dynamics and practices on a frequent basis to help the board adjust its strategies to more closely align with its mission and vision. By closing the loop on feedback and iterative improvement, you will enact more fulsome inclusion over time.

Outcomes of Focus Groups

DJA facilitated two focus groups with the CS&S Board. The first was with two incoming board members; the second included four existing and outgoing board members.

Overall, the discussions shed light on the operations and aspirations of the Board, as well as specific potential steps forward to improve onboarding and action toward an anti-racist organization. Several details below will generalize to any board.

Discovering culture and practicalities

As new members come onto the board, there are several types of onboarding to address in concert. Obviously, new members must get to know a great deal of information: current priorities, financial status, and ongoing projects. Many boards experience a bootstrapping process: procedures and organization are developed on a just-in-time basis to keep operations moving in initial years, and the time soon comes for more in-depth formalization.

Even more important than the packet information, though, is getting to know the organizational culture. New board members appreciate the opportunity to get to know existing board members and management. Mentoring into the culture is an important aspect of onboarding. Starting these conversations even during the nomination process will help new board members know what they’re getting into. This work also lays the groundwork for new voices to jump directly into discussion.

This extends beyond the operations: the *culture* of the board is central to everything else. What are the values the board operates with? How do those values show up in action?

In the context of our work, we also encountered the aspect of getting to know how non-profit boards work. While some incoming board members might have board experience and know what to look for, other members may not. Mentoring can also include shepherding into the language of nonprofits, the models of work and outcomes, and the communities served beyond the ones the member already knows. Furthermore, the particular kinds of work expected may need some orientation. For example, the Public Support Test recertification process requires particular kinds of work that new board members may not be familiar with.

Anti-racism in practice

The Board members we spoke with were firmly resolved to building an anti-racist structure and practices for CS&S and the organization's work. There is broad confidence that the existing board and management are on the same page: inclusion is a central value, and it must translate to action. For instance, the commitment to a diverse board was appreciated.

The most significant cluster of our discussion centered around how nonprofits can work to influence systems and structures that have been informed by white supremacy. For example: why do funding and philanthropy operate the way that they do? How could they be different? As systems built to privilege well-established projects that serve the majority, traditional funding models may not serve the values that many organizations want to exhibit. By imagining new models and evaluation frameworks, organizations can contribute toward a more anti-racist funding ecosystem over time.

There is also a good deal to be done within boards. An anti-racist board actively seeks diverse perspectives and experience, which has to do with overall background in addition to gender and race. As anti-racism takes center stage, there is an opportunity to define and operationalize that word. What does *anti-racism* mean to the board and the organization, and how does that value play out in funding, project prioritization, organizational support, and ongoing processes?

"Anti-racism is a lifelong commitment to awareness and action," in the words of one participant. By, for example, putting anti-racism and EDI goals on the agenda for every board meeting (or a section of the first board meeting for new members), organizations can continue to engage with and enact this commitment. Continual engagement leads to concrete action.

Doing the work

In the context of onboarding, there are two contexts for doing the work: portfolio and process. What does the board do month-over-month, and how does it complete its work?

The board's portfolio should, of course, come up in the packet for new members. On a continuing basis, there may be a need for new board members to have easy reference to the board's past work products, to get a sense of scope and scale.

In a broader focus, we discussed the processes and structures a board can use to get its work done. From the beginning, the first board meeting for a new member (and functionally, a newly composed board) sets the tone for the future. Take care to prioritize crucial elements that you want to have persist: consider agenda structure, methods of discussion, topics like anti-racism and EDI, and ways to communicate clearly.

Specific practices that came up included:

- Use the board to do strategic brainstorming, in balance with getting things done.
- Develop clear structure for discussion and action.
- Communicating with radical honesty: especially in challenging circumstances, it will be important to “clearly communicate in a way that’s friendly and unafraid”.
- Re-examine core functions and needs of the board.
- Evaluate the effectiveness of the board regularly: this can be as simple as setting goals and discussing them often.

These elements will be continually important in a more diverse board. Different backgrounds come with different expectations and mental models for how a group completes its work. By developing process and practice together, the group will function more effectively.

Acknowledgements

This document was produced by DeEtta Jones & Associates consultants Molly McInerney, DeEtta Jones, and Tyler Dzuba, in collaboration with Code for Science & Society Executive Director Danielle Robinson and Invest in Open Infrastructure Executive Director Kaitlin Thaney.