

Induction and Onboarding Elements

Consent to act as a director, disclosure, and declaration of not being a disqualified person signed

It is recommended that a legal expert prepare these documents. Examples of what these documents contain are found on the resource page at getonboardaustralia.com.au/better-board-recruitment-resources

A Deed of access and indemnity to sign

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Welcome email / phone call from Chair

Chair meeting to discuss style of leadership and how they run meetings

Forming a connection with the new board member is paramount and a responsibility of this Chair. A face-to-face meeting is preferred; however, a welcome email and / or phone call is just as valuable to a new board member. Use this as an opportunity to discuss culture; the way things work in the boardroom; your leadership style; and any other important information.

Discussion about culture, expectations, and requirements

Again, this can form part of the welcome email/conversation between the Chair and new board member, or between another board member and the new board member. As long as the conversation is happening, that's what makes a positive impact.

Review position description and expectations

If it hasn't been discussed yet, use this moment to review the new board member's position description and what it means for them 'in action'. This helps set clear expectations and ensures that all board members contribute equally.

Discuss committee involvement and appoint new board member to committee(s)

Most boards require each board member to serve on at least one committee. The new board member should know by now that committee service is required, so now is the time to discuss the committee they will be appointed to.

Access granted and inducted onto online board resources and other digital communication tools utilised by the board (for example, shared DropBox folders; online banking, etc.)

Any necessary security clearance, passwords, and/or passes setup and given to new board member

This is relevant if the board members have access to online, board-related documents, or other systems. Additionally, this is needed if they require security clearance to access certain meeting rooms or venues.

Email setup (if given an organisation-specific password)

If the board member is given an organisation-specific email address, they should be offered support to set this up through their preferred mail program (Outlook, Apple Mail, Gmail, etc.).

Email added to distribution list

If there is a centralised email distribution list, the new board member should be added to it (and past board members removed).

Contact information shared with board members

Every board member should have the contact information for every other board member. Provide an updated contact list to all board members as the board members change.

Welcome pack: any necessary additional information not received in due diligence and interview phase (for example: board charter; all organisational and board policies; Letter of appointment; Position description; Contact details and bios of key staff and all board members)

Have a comprehensive package of information that is given to new board members over and above what was provided to them during their screening and interview process.

Notify community of new board member via newsletter and/or social media

Use this moment as an opportunity to share positive news with your audience and for them to get to know the board better.

Introduction to other board members at first attended board meeting

It's worthwhile making time in the agenda for the new board member to introduce themselves to the other board members and share a little bit about their background and why they are on this board.

Board Buddy assigned

Joining the new board member with an existing board member will help them to settle in, give them someone to ask questions to, and have someone to guide them will enhance the experience of the new board member and help them to faster deliver value to the board and organisation.

Tour of offices / club / meeting venue**Discuss organisation structure and peoples' key responsibilities****Introduction to staff and other key people (employees and volunteers)**

Give the new board member insight into the day-to-day running of the organisation. Introduce them to the staff and volunteers, show them where the work is being done and offer the new board member a chance to ask some questions of the staff to get a deeper understanding of the organisation. This will help to inform their decision-making in the boardroom.

Send email to key staff and other stakeholders introducing new board member

An internal update about the new board member is an opportunity to share positive news and show staff that they are valued. This gives the staff an opportunity to better get to know whom they are working for, and who is leading the organisation.

Ensure new board members has all board meeting dates and other special event dates in their calendar

Having all future meeting, and other important, dates in the new board member's calendar ensures they will attend all necessary meetings. Board members are generally quite busy so setting your board meeting dates for the year helps to ensure all board members are available.

Deliver feedback on performance after a few months on the board (or earlier if required)

Feedback to new board members can greatly help them to further deliver value to the organisation or correct their behaviour if it's not meeting expectations. Even if the feedback is "you're doing great", it can help set the new board member's mind at ease. Regular feedback puts you on the front-foot as you're not waiting until things go wrong before having a performance conversation with a board member.