

NC Center for Nonprofits
 conference
 Rebuilding for Resiliency
 Dec 2020

**Building a
 WICKED GOOD
 Board Onboarding**

Presented by Jeanne Allen
 Jeanne@JeanneAllenConsulting.com



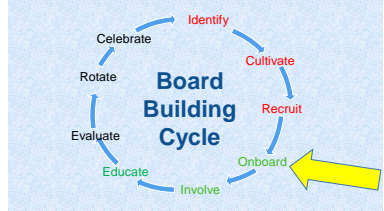
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BOARDSOURCE
 Certified
**GOVERNANCE
 TRAINER**

Duke
 UNIVERSITY

Jeanne Allen
 Trainer- Facilitator-Speaker

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- 1.Examine onboarding as a PROCESS
- 2.Explore creating SEVERAL points of contact
- 3.Utilize SMALL BITES



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Why? →

When? →

Who? →

What? →

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Why? →

#1 Define the Why

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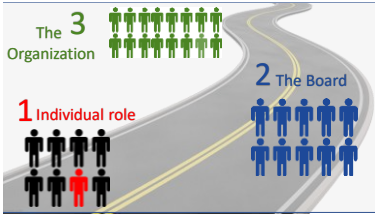


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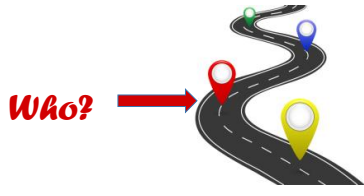
When? →

#2 Decide the When

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Poll:
 Who currently takes the lead on your board onboarding?
 a. Executive Director
 b. Board Chair
 c. Committee (Governance / Nominating, etc)
 d. Varies

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"How do you get board members to step it up so others don't have to do all of the heavy lifting?"

#3 Designate an onboarding leader.

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#4 Schedule and create bite-sized roles for other board members

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#5 Board Buddy

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What if onboarding is online?

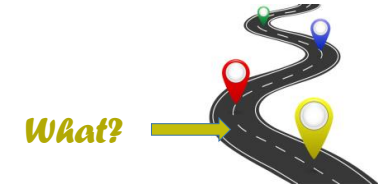
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Checklist: 10 Tips for Building a WICKED GOOD Board Onboarding

Created by Jeanne Allen Consulting
 Jeanne@JeanneAllenConsulting.com

1	Define the why
2	Decide the when
3	Designate onboarding leader
4	Create bite size roles
5	Institute a Board Buddy program

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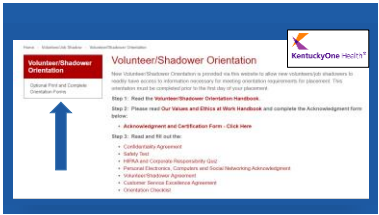
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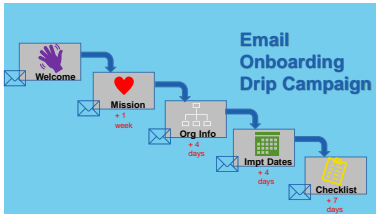
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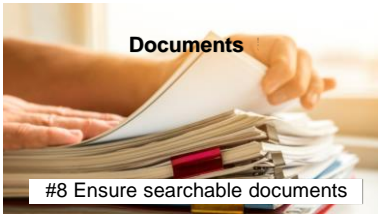


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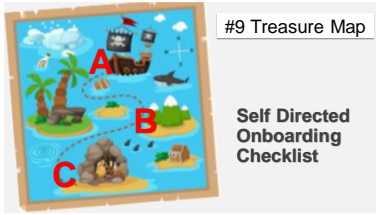
What did you hear in #6 Kit culture and #7 email drip campaign that stands out for you?

Type ideas in chat box

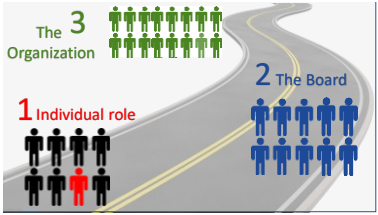
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<ul style="list-style-type: none"> Individual bd responsibilities Fundraising Calendar Dashboard Future focus <p>Responsibility</p>	<ul style="list-style-type: none"> Staff members Board members Board culture Stakeholders <p>Relationships</p>	<ul style="list-style-type: none"> Mission, vision Strategic Plan Advocacy role Budget History Signature programs <p>Mission</p>
Individual	The Board	Organization

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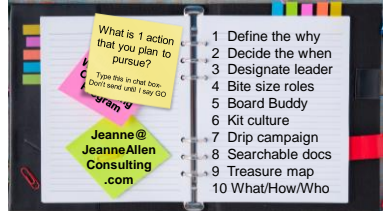
Category	Content	Method	Person
Program			
Finances			
Org Structure			
Board Roles			
Board Members			

#10 What/How/Who

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Category	Content	Method	Person
Program	"feel" for the work	tour, observation, client exit interview	Bd + St member
Finances	Flow of \$	Budget doc, graphic	Treas
Org Structure	Who does what	Review bylaws – highlight imp	self + bd chair
Bd Roles	Board operations	Scavenger hunt, "buddy", link to manual	Buddy + 1
Bd Mbrs	Facilitate integration	LinkedIn Links, speed networking	self + whole bd

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