

Sample Board Onboarding Series Outline

From National Board

This onboarding process was formatted as a series of one-hour meetings with new board members. This is a great way to get new board members up to speed about the organization and to get them engaged and connected immediately. These onboarding meetings were designed to overcome the learning curve new board members have through an expedited process.

1. NCJW's Organizational Structure

Session Goal: New board members gain a better understanding of the organizational structure of the organization – the national office, the sections, the board and the relationship between each of them.

2. NCJW's History

Session Goal: To give board members a sense of the history of the organization - both in terms of our accomplishments and in terms of our internal organization so that you are better equipped to engage in strategic thinking about the future.

3. Primer on NCJW's Financials

Session Goal: To provide an overview of our current operating financials and the story of our budget.

4. NCJW Board Retreat

Topics included: Introductions, National Network/Sections, Financial Report, Committees, and Advocacy Priorities

Goals of the Board Retreat:

- a. Build and nurture relationships between new and returning board member
- b. Create a shared understanding of the current state of the organization – our challenges and opportunities.

- c. Ensure that new board members gain a baseline understanding of the finances of the organization and their fiduciary role in ensuring our financial security.
- d. Inspire and engage all board members so they are excited about NCJW and their role in its success.

5. NCJW's Policy Work

The focus will be on how we make our policy decisions and the way we do our work.

6. NCJW's Fundraising Tools and Strategies

This will be a primer on our fund development strategy and plan as well as the board member role in fund development for the organization.