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# Learning Lab: Establishing/Updating Onboarding Processes for New Board Members

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Attachments [📎 Learning Lab: Establishing/Updating Onboarding Processes for New ...](#)

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## Summary

Effective board orientation is essential for organizational sustainability, mitigating risks, and ensuring board members clearly understand their distinct roles and expectations for success.

### **Current Operational Environment Volatility**

The current operating environment for free and charitable clinics is highly volatile, necessitating a strong, aware board to navigate anticipated increases in patient demand due to rising ACA premiums and unemployment. Informal polling showed that organizations frequently lack formal orientation, with CEOs usually responsible when one exists.

### **Orientation Components Define Roles**

Effective board orientations clarify decision-making authority, distinguishing governance from management, and cover expectations for fundraising, financials, and major risks. The process includes recruitment, vetting via applications, establishing agreements, and onboarding new members with necessary information.

## Struggling Board Indicators Discussed

Indicators of a struggling board include power struggles, lack of a CEO evaluation, 'rubber stamping,' or low fundraising engagement, issues an effective orientation process can alleviate. Vetting potential board members through volunteerism and committee participation was discussed as a successful practice for ensuring engagement.

## Details

- **Importance of Board Orientation for Organizational Sustainability:** Effective board orientation is crucial for organizational sustainability and enables the necessary planning in the current environment. The presentation focused on how orientation processes can create stronger, more effective boards that support the mission and long-term sustainability of free and charitable clinics. Resources, including slides and compiled materials, will be made available on MaryCatherine Jones's website for easy post-presentation access.
- **Current Context for Free and Charitable Clinics:** The current operating environment for free and charitable clinics is highly volatile, described as analogous to intense ocean currents that the organizations have no control over. A strong, aware board is essential to navigate this landscape, as issues like rising ACA marketplace premiums and unemployment are anticipated to lead to an increase in patients seeking services from these clinics. Regardless of where a clinic sits on the spectrum of capacity, it is important for the board to be aware and engage in problem-solving.
- **Polling Results on Orientation Responsibility:** An informal poll regarding the board orientation process revealed that many organizations may lack a formal onboarding process, especially those with low board member turnover. For organizations that do have an orientation, the CEO is primarily responsible for conducting the board member orientation.
- **Common Indicators of a Struggling Board:** Several signs indicate a board may be struggling, including the CEO having difficulty making decisions without authorization, power struggles among board members, or boards exhibiting extremes such as "rubber stamping" decisions or engaging in management tasks

like deciding t-shirt colors. Other indicators include a lack of a CEO evaluation process, the existence of "shadow boards," and low fundraising engagement, such as not achieving 100% board contribution participation. Establishing an effective, written orientation process can help alleviate these issues by providing a clear, best-practice structure.

- **Key Components of Effective Board Orientation:** Effective board orientations generally clarify who holds decision-making authority and the distinct roles of governance versus management. They also cover board member expectations for fundraising and community engagement, the organization's financial model, and major risk areas including financial, policy, and regulatory environments. Furthermore, it is important for the orientation to clearly define the structure, meeting schedule, and leadership of any organizational committees.
- **Four Components of the Orientation Process:** The orientation process can be viewed as having four key components: recruitment, the initial vetting process using an application, the agreement process where expectations are established, and the onboarding process, which provides new board members with the necessary information to succeed. Resources for each of these areas, including a board composition matrix for recruitment and sample application forms, have been compiled and shared by MaryCatherine Jones. The process should be a "living" event, incorporating annual board self-assessments and regular review of written board member job descriptions.
- **Board Orientation and Member Agreements:** Board member agreements should specify the expectations of engagement, such as meeting frequency, and detail opportunities for political action or relationship building with potential donors and volunteers. The board packet should include important documents like a conflict of interest policy and a code of conduct, which board members should be able to reference easily. Organizations should aim to channel the enthusiasm of new board members immediately by providing them with a clear understanding of their new role and what will happen next.
- **Desired Outcomes of Effective Orientation:** An effective orientation should ensure board members are confident in articulating the organization's current mission, funding sources, and the demographics and geographic area of the population they serve. Board members should also understand and be able to articulate the major risks to the organization and the specific expectations of their role, which can be facilitated by a mentor program with an existing board member. Board members should have a clear understanding of how the

organization works, including its services, financial and eligibility policies, and how the CEO is evaluated.

- **Discussion on Committee Participation and Vetting:** A discussion arose regarding the feasibility of having interested non-board members participate in committees as a trial run before joining the board, which might help determine their level of engagement. Terri Belletto shared their organization's positive experience with vetting board members through volunteerism, where 10 of their 12 members are active volunteers who take leadership roles, leading to the most productive board meetings they have experienced. MaryCatherine Jones noted that committee participation by non-board members might depend on whether the committee is a formal "board committee" with decision-making roles that require adherence to codes of conduct.
- **Community and Partner Role in Board Membership:** It is valuable for board members to possess knowledge of the community and the population served, preferably through direct interaction. Connections with community partners, such as organizations they refer to, and access to donors or volunteers, are beneficial for collaboration and maintaining the organization's visibility in local business profiles. Board members should also have clear expectations regarding attendance, term limits, committee participation, fundraising roles, and taking part in annual board assessments.
- **Board Assessment and Key Takeaways:** The use of board self-assessments, such as one from the Chronicle of Philanthropy or one tailored to the free and charitable clinic environment, helps create clarity for board members and addresses issues of governance, strategic planning, funding, and community role. The final three key takeaways shared are that developing a strong board takes time, that engaged board members lead to a stronger organization, and that a stronger organization is better equipped to protect the mission and advocate for continued successful healthcare services.

## Suggested next steps

- [MaryCatherine Jones] Post Resources: Make presentation slides and compiled materials accessible on personal website for attendees. Ensure materials are easily downloadable after webinar completion.

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