



# Onboarding Toolkit

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Onboarding is an opportunity for chapters to orient incoming board members to their roles, educate them about responsibilities and expectations, and familiarize them with the structure and culture of the chapter. By participating in an effective onboarding program, new board members can support the chapter’s mission and vision and succeed in their roles from day one. Onboarding is not a singular event; rather, it begins before and continues after a board member’s first meeting. Onboarding is a critical process that ensures your board can meet—and even exceed—your members’ needs and expectations.

This toolkit is designed to support chapters in developing an effective onboarding program by sharing guides, templates, and best practices.

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## SECTION I: DEVELOPING LEARNING OBJECTIVES

Before you get started, identify clear and defined learning objectives for the onboarding program. The learning objectives should clearly articulate the information, tasks, and responsibilities that new leaders will understand once they have completed the onboarding process. Establishing objectives will also assist you in identifying and compiling the information that your new leaders need to know.

A set of sample objectives is available for you to reference.

### Sample Learning Objectives

After completing the onboarding program, new chapter leaders will:

- *Be familiar with the chapter's mission and vision, history, bylaws, operational plan, health, and standard operating procedures.*
- *Understand the resources and professional development opportunities available through the chapter and ATD.*
- *Recognize the board's structure, policies, and procedures.*
- *Be cognizant of the expectations and responsibilities related to their role.*

## SECTION II: IDENTIFYING AND COMPILING INFORMATION TO INCLUDE IN THE ONBOARDING

Once you have established the learning objectives for the onboarding, you can begin identifying and compiling important information to include. In general, onboarding should address chapter-specific information, ATD resources and professional development opportunities, the role of the board and its policies and procedures, and the expectations and responsibilities of individual board members.

### Chapter-Specific Information

Whether the new leaders are longtime chapter members, nonmembers, or even experienced volunteers, they will benefit from learning more about the chapter's mission, vision, history, bylaws, operational plan, health, and standard operating procedures. Sharing this information serves to educate leaders about the structure and culture of the chapter. The outline below can also serve as an agenda for the conversations between incoming board members and their predecessors.

1. **Mission and Vision:** Describe how the chapter's mission and vision drive the work of the board and how they align with [ATD's mission and vision](#).
2. **History:** Summarize the chapter's history to provide context for why the chapter was established. Be sure to mention notable successes and past challenges.
3. **Bylaws:** Share a copy of the bylaws with new leaders and explain the process for making amendments. Review information related to board meeting attendance, board nominations, elections, and vacancies.

4. **Operational Plan:** Review the chapter's current operational plan and describe how the chapter identifies strategic goals, implements a plan to achieve them, and tracks its progress. Sample operational plans from other ATD chapters are listed below.
  - a. [Chicagoland's Operational Plan](#)
  - b. [Florida Suncoast's Operational Plan](#)
  - c. [San Diego's Operational Plan](#)
5. **Chapter Health:** Discuss the ways in which the board measures and evaluates chapter health. Point out any key metrics that board members need to monitor as part of their respective responsibilities. Include information on the chapter's past [Chapter Affiliation Requirements](#) (CARE) survey and the respective elements related to their role.
6. **Standard Operating Procedures (SOPs):** Ensure that current board members review and update the chapter's SOPs before they are shared with incoming leaders.

## ATD Resources and Professional Development Opportunities

ATD provides various resources and professional development opportunities that can assist chapter leaders in completing their day-to-day tasks as well as support them in developing their leadership skills. By clearly outlining the support and opportunities that ATD offers, you can ensure that your leaders have the tools they need to get the job done.

### Chapter Services

ATD has a dedicated [chapter services team](#) that supports chapter leaders across the country. Each chapter has a dedicated [chapter relations manager](#) (CRM) who is available to familiarize board members with ATD resources; participate in board meetings or planning retreats; support chapter events with ATD collateral; connect chapter leaders and highlight best practices; and provide administrative, membership, and marketing guidance. Contact your CRM to learn more about how he or she can support your chapter.

### National Advisors for Chapters

The [National Advisors for Chapters](#) (NAC) are distinguished ATD chapter past presidents who serve as national volunteer advisors to the chapter services team and chapter leaders. The mission of the NAC is to serve as advisors, advocates, and mentors within ATD on matters of chapter management and operations to ensure high-quality service to members. The chair of the NAC also serves on the ATD Board of Directors. NAC members are charged with providing strategic direction and leadership in the development and support of ATD chapters and members.

Each chapter has an assigned NAC who can work with your chapter to identify and share best practices, provide guidance about items related to the [Chapter Affiliation Requirements](#) (CARE), and advise and coach your chapter about ATD initiatives. Reach out to your NAC to learn more about the support they can provide to your chapter.

### Chapter Leader Onboarding

Members of the NAC and chapter services facilitate an orientation and onboarding webcast for new chapter leaders each year. This webcast serves to provide information about ATD and familiarize leaders with available resources. Recordings of past webcasts are archived and available for chapter leaders to view in

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the [chapter webcast archives](#). There is also a [Chapter Leader Onboarding Checklist](#) that leaders can complete to learn more about ATD support and resources.

### Chapter Leader Community

The [Chapter Leader Community](#) (CLC) is an online collection of resources created specifically for ATD chapter leaders. The CLC includes resources related to chapter administration, finances, membership, board development, communications and marketing, and best practices. Provide new chapter leaders with the [CLC short links document](#) so they can easily identify and access the materials they need.

### Leader Connection Newsletter

The [Leader Connection Newsletter](#) (LCN) provides ATD chapter leaders with important information that enables them to run successful chapters. The LCN is distributed monthly via email and is also available [online](#).

### Power Membership Resources

ATD provides chapters with a number of resources to support their efforts to promote Power Membership, also referred to as joint membership. The [Power Membership Resources page](#), located in the CLC, has resources to support the promotion of Power Membership on your chapter's website, through email, and at upcoming events.

### Chapter Affiliation Requirements

The [Chapter Affiliation Requirements](#) (CARE) are a set of performance guidelines designed to help chapters deliver consistent benefits to members. CARE consists of elements in five key areas necessary for running a chapter like a business: administration, financial, membership, professional development, and communication. Each year, ATD chapters must complete a CARE submission, which includes a self-survey and a copy of the chapter's board roster, membership roster, operating plan, and most recent yearly balance sheet and income statement. The CARE submission is due on January 31. Additional information and resources are available at [www.td.org/CARE](http://www.td.org/CARE).

### Sharing Our Success

[Sharing Our Success](#) (SOS) is a chapter recognition program that helps chapters improve through sharing and finding easy-to-use ideas, resources, and practices. Approved SOS submissions are available to view at [www.td.org/SOS](http://www.td.org/SOS).

### ATD Membership

In exchange for their commitment and service to chapter members, ATD chapter leaders receive a significantly discounted rate on ATD membership including a complimentary upgrade to Professional Plus membership. Professional Plus membership includes access to a library of ten adaptive learning courses, e-books, *TD at Work* issues, a research report, a *TD* magazine subscription, free webcasts, and more. Chapter board members are required to maintain joint chapter and ATD membership to ensure that their chapter is CARE-achieved.

### Events for Chapter Leaders

ATD organizes two annual events, the [ATD Chapter Leaders Conference](#) (ALC) and [Chapter Leader Day](#) (CLD), specifically for chapter leaders. ALC and CLD provide chapter leaders with the opportunity to network with fellow leaders, share best practices, and learn about new resources to support their chapters. ALC takes place in October and is a three-day event with multiple tracks based on chapter leader roles. CLD is a half-day program that takes place on the Sunday of [ATD's International Conference & Exposition](#) in May.

## ATD Leadership Opportunities

Chapter leaders are eligible to serve on several chapter-related committees, including the [National Advisors for Chapters](#) (NAC), the [ATD Chapter Leaders Conference Program Advisory Committee](#) (ALC PAC), and the [Chapter Recognition Committee](#) (CRC). Members of the NAC are distinguished ATD chapter past presidents who provide strategic direction and leadership in the development and support of ATD chapters and members. The ALC PAC is charged with reviewing and recommending session proposals for ALC, identifying programming gaps, and recommending topics and speakers to fill those gaps. Members of the CRC recommend and select [Sharing Our Success](#) (SOS) submissions for recognition and identify chapters for the [Chapter of the Month](#) (COM) distinction. More information about these committees is available in the [ATD committees at-a-glance document](#).

## Board Role, Policies, and Procedures

Each board member has responsibilities that relate to a specific area of the chapter, such as membership or programming; however, the board as a whole is responsible for providing strategic direction, identifying goals, and evaluating the chapter's performance. Onboarding should address the board's policies and procedures as well as information concerning its structure, governance, and meetings.

### Policies and Procedures

Include all information that references the board's policies and procedures. Policies you may want to address during onboarding include those related to the code of ethics, document retention, expense reimbursement, and data management.

### Organization Chart

Share a copy of the chapter's organization chart so board members clearly understand the chapter's structure, other board members' areas of responsibility, and any teams they will be responsible for managing.

### Governance

Regardless of their position, board members should know, or at least know where to find, the chapter's legal name, employer identification number (EIN), tax exempt status at the state and federal levels, and incorporation status. Sharing this information with all board members will support the chapter's knowledge management and may prevent legal issues in the future.

### Meetings

Chapter leaders should receive a schedule of any meetings and events that they will be expected to attend throughout their term as well as policies related to meeting attendance. Chapter leaders should understand how the meeting agenda is developed, any materials they will be expected to review prior to the meeting, and any information or deliverables they will be expected to share during meetings. If your chapter follows [Robert's Rules of Order](#), it may be helpful to share an overview during the onboarding process or direct people to additional resources.

## Individual Performance of Board Members

Once board members have a clear understanding of their shared purpose, you can begin to address information relating to their individual performance. It may be helpful to have new leaders review this information on their own or with the board member currently serving in the role.

## Expectations and Accountability

Chapter leaders should understand the chapter's expectations of them and how they will be held accountable for their actions. Discussing this information will support the chapter's efforts to create an environment that fosters trust and facilitates learning. Review the chapter's plan for addressing violations of the code of conduct.

## ATD Competencies

Ask new board members to review the [ATD Competency Model](#), which defines the skills and knowledge required for talent development professionals to be successful now and in the future. Board members should understand how to use the model for professional development and career planning purposes and how the model informs the chapter's professional development offerings and other programs.

## Job Descriptions and Responsibilities

Ensure that chapter leaders thoroughly review their respective job descriptions and responsibilities. If possible, connect them with past board members to pose questions and learn about best practices. Current board members should have an opportunity to edit the job description and list of responsibilities for their role before their term ends. This portion of the onboarding should also address tools that leaders will use in their roles and the chapter resources available to support them.

## SECTION III: DETERMINING THE TIMELINE AND DELIVERY METHOD

After you have assembled the content you can begin to determine the timeline and delivery method for the various pieces of information. In developing the timeline, you should identify the information that will be most relevant to a new chapter leader before she assumes the role, 30 days into the term, 60 days into the term, and so on. Consider how information can be presented in the most efficient and engaging manner, whether in a large meeting, small group, one-on-one, virtually, over the phone, or as a hard copy.

## Onboarding Road Maps

Create an onboarding road map to outline when and how content will be presented and to share supplemental resources that board members can reference. Sample road maps that highlight helpful ATD resources, and include room for customization, are available for the following positions: [President](#), [President Elect](#), [Past President](#), [Finance-Treasurer](#), [VP Administration](#), [VP Marketing-Communications](#), [VP Membership](#), [VP Programs](#), [VP Technology](#), [Director of Social Media](#), [Director of Student Relations](#), and [Director of Talent Management](#).

| Topic                                | When Will Content Be Shared?   | How Will Content Be Shared?   | Additional Resources                                |
|--------------------------------------|--|---|---|
| Chapter mission and vision           | 30 days before leader assumes her role   | Chapter website   | Supplemental websites, PDFs, videos, articles, etc. |
| Chapter policies and procedures      | At first board meeting on January 5  | Group conversation  | Supplemental websites, PDFs, videos, articles, etc. |
| ATD Chapter Leader Community         | At first board meeting on January 5  | Group conversation  | Supplemental websites, PDFs, videos, articles, etc. |
| Job description and responsibilities | 30 days before leader assumes her role and again during first board meeting on January 5 | Word document and during one-on-one conversation with outgoing board member | Supplemental websites, PDFs, videos, articles, etc. |

## Onboarding Email Series

Leverage the [Onboarding Email Series](#) toolkit to share timely information with board members during the 60 days before and after their terms. Each email can be customized with information about the chapter’s processes and resources, and they also highlight ATD resources and programs that are most relevant to the various roles.

## Transition Meeting Sample Agenda

You may also consider scheduling a transition meeting as part of the onboarding process. These meetings bring incoming and outgoing board members together so they can get to know one another, review responsibilities and resources, discuss challenges, and share best practices. Transition meetings ensure that all board members are up to speed on critical information and support the successful hand-off of responsibilities.

The sample agenda below is broken into three stages, each of which refers to a different joint meeting between incoming and outgoing board members. If your chapter is only able to organize one joint meeting, think about how you might adapt the prework and agenda to fit into a more condensed timeframe.

- **Stage One:** Initial Meeting
- **Stage Two:** Planning Retreat
- **Stage Three:** Presentation of Final Plans

|                          |  |
|--------------------------|--|
| <i>Stage One Prework</i> | <ol style="list-style-type: none"> <li>1. Current president will contact each elected officer for a one-on-one conversation to:               <ol style="list-style-type: none"> <li>a. Discuss the vision for the upcoming year.</li> <li>b. Discuss the importance of sustainable work in addition to individual effort.</li> <li>c. Discuss the importance of establishing and managing committees as well as recruiting volunteers to help.</li> <li>d. Review the job description.</li> <li>e. Review the goals format.</li> <li>f. Review ALC.</li> <li>g. Answer questions.</li> <li>h. Review the format of board meetings.</li> </ol> </li> <li>2. Each newly elected officer will contact the incumbent and have one-on-one time to build a relationship and discuss transition prior to first board meeting.</li> </ol> |
| <b>Stage One Agenda</b>  | <ol style="list-style-type: none"> <li>3. The newly elected officers will attend the first board meeting.</li> </ol>   |
| <i>Stage Two Prework</i> | <ol style="list-style-type: none"> <li>4. First pass at goals for the year (high-level) will be prepared by each officer during the first board meeting.</li> </ol>  |
| <b>Stage Two Agenda</b>  | <ol style="list-style-type: none"> <li>5. All officers will attend the board planning retreat.</li> </ol>  |



|                              |   |
|------------------------------|---|
| <i>Stage Three Prework</i>   | 6. Incoming and outgoing officers will discuss how to resolve any questions prior to next month's meeting.  |
| <b>Stage Three Agenda</b>    | 7. The final joint board meeting between incoming and outgoing officers will be held. Outgoing officers will present their final recommendations. |
| <i>Stage Three Follow-Up</i> | 8. Changes or questions about final recommendations will be resolved before the next board meeting.   |

## SECTION IV: INTRODUCING AND WELCOMING NEW LEADERS

Introducing your new board members to the membership and welcoming them to the chapter are crucial elements of the onboarding process. Sharing information about new leaders with chapter members allows them to ask questions and learn about the leaders' vision for the year ahead and gives them insight into the inner workings of the chapter. When new leaders feel welcomed into the chapter, they are more likely to feel that their contributions are valued, and they may be more likely to continue—or even increase—their engagement with the chapter. Your chapter may choose to introduce and welcome new leaders through a formal installation of officers ceremony or through an informal networking event.

### Installation of Officers Ceremony

Conducting an installation of officers ceremony introduces new board members to the membership, reminds them of their responsibilities and oaths, and serves to formally induct them as chapter leaders. Incoming and outgoing board members should be present for the ceremony along with chapter members.

## SECTION V: FOLLOW-UP AND EVALUATION

The chapter should follow up with new board members throughout the year to reinforce what they learned during the onboarding. In addition, the chapter should continually evaluate the success of the onboarding to make any necessary changes and improve results.

### Ongoing Onboarding

Above all, onboarding should be understood as a continual process rather than a one-time event. Providing new leaders with multiple opportunities to reinforce their learning will help them feel more confident in their roles and enable them to achieve better results for the chapter. When your new leaders leave their final onboarding session confirm that they understand where to go to find information and whom to turn to with questions.

### Mentorship Programs

Mentorship programs provide new board members with an opportunity to learn from experienced leaders in a comfortable environment. Your chapter may consider establishing an informal mentorship program to support knowledge management and the continued engagement of outgoing board members.

### Evaluation

After onboarding is complete, check in with key stakeholders to evaluate its success. Check in with new leaders, outgoing leaders, and anyone else who was involved in the development and delivery of the

onboarding to collect their feedback. Any follow-up call or survey should evaluate whether the learning objectives were met, feedback from participants (including facilitators, outgoing board members, and new leaders), logistics (such as location and timing, room setup, food, AV, and so forth), use of technology, any “aha” moments, and suggestions for next year. A sample post-onboarding survey is available below.

|                                | Excellent                        | Good                  | Neutral               | Fair                  | Poor                  | N/A                   |
|--------------------------------|----------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| <b>Onboarding location</b>     | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <b>Relevance of content</b>    | <input type="radio"/>            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <b>Onboarding facilitators</b> | <input type="radio"/>            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <b>Mastery of content</b>      | <input type="radio"/>            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <b>Length of onboarding</b>    | <input type="radio"/>            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <b>Additional resources</b>    | <input type="radio"/>            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

**How relevant was the content to your role as a chapter leader?**

**How would you rate the overall effectiveness of the onboarding program?**

**Please provide suggestions for content and delivery methods for next year's onboarding:**

**Please provide any other comments you have about your onboarding experience:**

In closing, onboarding is a crucial component of the chapter leader experience that can have a lasting impact on leaders' engagement and effectiveness. Notably, a positive onboarding experience can increase the likelihood that volunteers will stay engaged with the chapter for a longer period of time. By organizing an effective and engaging onboarding process, your chapter will equip new leaders with the knowledge and skills they need to serve the chapter and advance the talent development profession in your community.