

DEVELOPING AND EXECUTING YOUR WELCOME AND ONBOARDING PLAN



Council for
Exceptional
Children



Identify your Lead

Who will handle executing the welcome and additional onboarding steps for your new members?

Will your Unit require more than one individual to execute this process?

- Consider having your membership chair run this process or using a new member support committee!
- When the lead for this initiative is named, they should move forward with the following steps, creating a committee or welcoming added support from non-board members as necessary.

TIP: This is a great opportunity to tap into Volunteer Square to involve individuals who have already expressed interest in volunteering!



Establish Cadence of Welcome Messages

How often will reports be pulled and welcome letters be sent? Monthly? Bi-monthly?

Be sure to:

- Establish dates by which these reports will be pulled.
- Establish dates by which welcome messages will be sent out.

Consider how often members are joining and any programs or recruitment initiatives that may make particular seasons busier. For example, if you are hosting a recruitment event, you may want to do these weekly for the month so as to not overwhelm yourselves if 25+ members join at once.



Pull and Review List of Members

A list of members should be pulled for your unit (officers can pull this from their member profile).

At minimum, your Unit should send a welcome letter to those pulled from the “CEC Individuals that have Joined” report; your Unit should also consider pulling the “CEC Individuals that have Returned” report and offering a connection opportunity with those individuals to welcome them back.

TIP: Can't pull your list of members? Email dwieczorek@exceptionalchildren.org with your updated officer roster (name, position and term dates). Once updated, officers can pull your membership list!



Customize Welcome

Elements of your welcome letter can be matched to the membership type, membership description, and/or if you know they joined because of an upcoming/recent program or event hosted by your unit.

- Solicit programs, initiatives or volunteer opportunities from your peers on the Unit's board to highlight in your welcome letter so it stays relevant and is collaborative!

TIP: Wondering where to start? Check out our sample Welcome Letter Template, available in Unit Resources!



Follow Up

Be sure to include the contact information of the person best suited for follow-up questions in your welcome letter.

Consider offering a additional space to ask questions or share areas of interest with you such as a Google Form. Then, use the form to identify follow-up responsibilities within your "welcome committee" or board meeting

Following their welcome, be sure to follow up with the new member at least once after sending your initial letter to answer lingering questions and ease into their me



Take it a Step Further!

Once the welcome process is solidified and smooth-running, **consider adding new elements to your onboarding process** such as:

- New member meet and greet opportunities – these can be with each other and/or members of your board! These can be held quarterly or twice a year based on the number of new members joining at any given time.
- Buddy systems – pairing new members with another member of CEC who is well-connected, engaged and willing to assist in helping a new member navigate:
- CEC platforms such as CECCommunities, CEC Learning Library, Exceptional Teacher Resources Repository, etc.
- Unit events/programs such as book clubs or committee meetings
- Social gathering or networking event
- Offer a guest pass to one of the events above to empower new members to recruit their own friends and colleagues

Data Tracking Tips

To best inform your onboarding and welcome practices, keep track of:

- How many new members joined each month, and how many renew the next year
- The efforts a part of their welcome and onboarding process. (Did something offered one month help with retention more than other months?)
- Use this data to inform your letters/onboarding processes.

