



Onboarding New Trustees

A Guide for School and Board Leadership

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Introduction

Good governance leads to stronger student results.

It may sound abstract, but the connection is direct: boards that govern well, serve their students more effectively over the long term. Strong boards set clear strategic direction, hire and support strong leaders, ensure financial sustainability, and hold themselves accountable to the mission. Effective boards are able to sustain a school through the leadership changes and strategic challenges that every school eventually faces. For charter public schools in particular, strong governance is not a nice-to-have. It is the foundation on which everything else rests.

Good governance is not episodic; it must be continuous. A board does not govern in a moment; it governs across time, through the accumulation of informed decisions made by people who understand their role and take it seriously. That continuity depends on having trustees who are prepared to contribute — not just eventually, but **quickly**. A new trustee who takes a year to find their footing is a year of governance capacity the board does not have. Boards turn over. Terms end. Life circumstances change. Each transition is an opportunity — but only if the incoming trustee is genuinely ready to engage.

And getting new trustees ready quickly does not happen by accident. It requires intentional planning. Every time a new trustee joins the board without a thoughtful onboarding process in place, the board accepts an avoidable risk — a trustee who may not fully understand their role, who feels disconnected from colleagues, or who makes well-intentioned but uninformed decisions. In governance, these are not minor inconveniences. They are real threats to the board's ability to fulfill its responsibilities to students and families.

This guide will walk you through the full onboarding process, from identifying candidates to building a feedback loop for continuous improvement. If you need new board members, focus on how to recruit strategically. If you are looking to accelerate new board member contributions, focus on new member orientation. No matter what, take what is most useful for where your board is now and build from there. Just like your school leader's role is to make improvements in student outcomes, your job as a board is to make improvements in your board effectiveness.

Finally, let us offer that the Governance Committee is the natural home for trustee recruitment and onboarding. No matter how small your board is, you will want an active Governance Committee to ensure the health of the board.

Certain elements of this process are legally required and non-negotiable — those are clearly identified throughout.

We are grateful for the insight and experience shared explicitly by the board leaders of Cambridge Community Charter School, Phoenix Charter Academy, and Worcester Cultural Academy, as well as the insight and experience shared by boards and leaders throughout the sector in conversations over the years.

Key Goals for Onboarding a New Trustee

Effective onboarding serves several goals simultaneously. The best processes accomplish all of the following:

- **Builds role clarity from the start.** Expectations should be communicated clearly before a trustee joins and then reinforced throughout orientation, including time commitments, how the board operates, and the role of governance versus management.
- **Accelerates meaningful contribution.** A well-onboarded trustee can engage substantively from early in their tenure — asking informed questions, contributing to committee work, and participating in governance decisions with clarity about their role.
- **Establishes mutual trust.** A new trustee needs to trust the board they are joining, and the board needs to trust the new trustee. Strong onboarding creates the conditions for both.
- **Develops genuine relationships.** A trustee who feels connected to fellow board members is more willing to ask hard questions, more comfortable in difficult conversations, and more likely to remain engaged over time.
- **Meets all statutory requirements.** Massachusetts charter public school trustees are subject to specific legal obligations, including DESE approval, ethics training, conflicts of interest disclosure, and Open Meeting Law training. These are mandatory, not optional.

Onboarding Begins With Trustee Recruitment

Recruit New Board Members Strategically

Onboarding does not begin at a new trustee's first board meeting; it begins when your board starts identifying who should join next. Rather than filling vacancies reactively, the Governance Committee should maintain an ongoing list of potential candidates and develop those relationships over time. When a vacancy arises, a forward-thinking board will already have a sense of its strongest options.

How do you find trustee candidates? Think creatively! Here are a few ideas:

- **The School's Current Supporters.** You likely already have people who support your school - with their time, money, or expertise. These are people who have already found you and have demonstrated an interest in seeing your success. Mine those!
- **The School's Partners.** With whom does your school partner? Other businesses, non-profits, or universities? Do those organizations have employees or board members who might also be interested in seeing your school's success?
- **Colleagues or Colleagues of Colleagues.** Undoubtedly, your board members have networks already to tap into! If you are clear about what you are looking for, it will be easier for colleagues to think of other colleagues!
- **Chambers of Commerce.** Often, Chambers of Commerce have networking or training events that may attract local professionals with the skill sets you are looking for. They may even have their own programs to connect volunteers to board positions.
- **The Parent Community.** Are there parents of current or former students who have the skills you are looking for, as identified in your structured skills matrix? Of course, you will want to make sure that any parent who joins is aligned to the school's needs, not just their own child's.
- **The Alumni Community.** If your school has been around for a while, your former students have likely grown and developed into adults who can help! Your alumni likely have a predisposition towards wanting your school to succeed.
- **Your Leader!** Your leader is in the community all the time - and is likely meeting people on a regular basis who could be aligned to your school's needs. And if your leader grew up or went to school in your area, their network is even stronger.

- Reach out to board members of other charter schools - they likely have ideas, too! Robert Carpenter at MCPSA can help you with those connections.

As you evaluate candidates, think ahead about your board's needs. What skills or perspectives might become critical over the next one to three years, based on your strategic plan? Identifying gaps before they become urgent gives the board room to make deliberate choices rather than rushed ones. A structured skills matrix — capturing the strengths, backgrounds, and areas of expertise of current board members — is a practical tool for this work. A simple matrix reviewed annually as part of board self-evaluation can make the difference between proactive recruitment and reactive gap-filling. (See **Appendix: [Board Composition Matrix - TEMPLATE](#)**)

Begin to build relationships with potential trustees by engaging them in the life of the school. Invite them to student performances, fundraiser events, or other mission-specific events that might be of interest. At this stage, you are simply building a bench of potential future trustees; you are assessing if they are truly interested in being a part of your school community.

One particularly effective approach is to invite prospective trustees to participate in a committee as an “outside community member,” if your bylaws allow it. (And we would argue to adjust your bylaws to allow it, if they don't already!) This gives both parties a realistic, lower-stakes opportunity to assess fit before making a formal commitment. In some cases, this kind of pre-board committee engagement means that formal onboarding is nearly complete before a trustee ever joins.

"Our best board members serve on committees first. When they join the board, they aren't just ready to do the work, they are already doing the work."

In other cases, boards avoid a bad appointment when they learn that the committee member doesn't regularly follow through on their commitments or doesn't always show up prepared.

Building your bench of potential trustees is a continuous effort. It is a critical strategy to reduce the chance that a board will allow the pressure to fill a vacancy, leading them to nominate a candidate who is not actually right for the board.

Approaching a Potential Trustee

When you are ready to have a formal conversation with a candidate, consider who should make the ask — a board member, the Executive Director, or a combination of the two. The right messenger often depends on the candidate's existing relationship with the school. Importantly, this is a critical moment in the process to build a trusting relationship with a potential new trustee.

Whatever form the conversation takes, the most important guidance we can offer is this: be honest, be direct, and do not treat this as a sales conversation. Charter school trustees carry real legal and fiduciary responsibilities. A prospective trustee deserves a clear-eyed picture of what they are being asked to take on, not a pitch calibrated to make the role sound easy. Be explicit about:

- **Time requirements:** Meeting frequency and duration, committee obligations, and any other expectations beyond the regular board calendar.
- **Conflicts of interest:** Any existing relationships with the school that might create a conflict of interest. Surface this early.
- **Fundraising expectations:** Any expectations around individual giving or participation in development efforts.
- **What skills or perspective you hope they contribute:** Why are you approaching this specific person? Be clear about the skills or perspective you are hoping they bring.

Provide substantive materials about the school — the most recent audit, annual report, strategic plan, and bylaws. Encourage them to observe a board meeting and visit the school before committing to the board - that will create another opportunity for both the candidate and the board to learn about the candidate's readiness for board work.

Also seek to understand the candidate's interests and whether they are aligned to the governance role. This is especially important when the potential candidate is also a parent of current students or a friend to current employees. You want trustees who recognize that they are making a long term commitment to the school - it's not about one issue or the current members of the school community.

Importantly, If a candidate declines or turns out not to be the right fit, do not push. The board is better served by patience than by filling a seat with the wrong person or one who truly does not have the bandwidth to commit fully. (Though if that is the case, you might ask about returning to the conversation in the future.) A trustee who is poorly matched in terms of availability, expectations, or orientation to the governance role will not serve the board well, regardless of how eager they are to join. A board with a vacancy is in a stronger position than one carrying a disengaged or misaligned trustee.

The Formal Process: Voting and Legal Requirements

Once the Governance Committee is ready to move forward with a candidate, the next step is a formal board vote. Your bylaws should describe a clear process for adding new trustees — and you should follow it precisely. Common elements include sharing the candidate's biographical information with the full board in advance, conducting the vote without the candidate present so that the board has full opportunity to deliberate openly, and ensuring the vote takes place at a properly noticed public meeting in compliance with the Open Meeting Law. If your bylaws are unclear on this process, use it as an occasion to strengthen them. Following your bylaws carefully ensures the full board is engaged in the Trustee's appointment - which is another important way to build trust between the board and the new trustee.

Before a new trustee can participate in board governance, several mandatory legal requirements must be completed. The Governance Committee or staff liaison should maintain a checklist to ensure nothing is missed:

Legal Requirements — These steps are mandatory and non-negotiable. They can be found on the DESE website [here](#).

- **DESE Approval:** DESE must approve a new trustee before they can formally serve. Initiate this process promptly after the board vote. Instructions are [here](#).
- **Ethics Training:** New trustees must complete the State Ethics Commission's conflict of interest training and certify completion. This is required by law.
- **Open Meeting Law Training:** Trustees must complete OML training within the required timeframe. Resources are available through the Attorney General's office.
- **Conflict of Interest Disclosure:** New trustees should complete any required disclosures under the school's policies and applicable state regulations.
- For questions and advice about conflict of interest, please call the main number at (617) 371-9500 and ask for the Attorney of the Day, or you can electronically [request an informal written opinion](#).

While DESE's approval is pending, the new trustee can and should be included in board communications, invited to meetings, and assigned to a committee. However, they are not yet voting members and should understand that distinction clearly. MCPSA provides training and resources to help new trustees meet their legal obligations. Reach out if you need guidance navigating this part of the process.

Orientation: Building Knowledge, Culture, and Relationships

Once the formal process is underway, the active work of orientation can begin. One essential framing: orientation does not happen in a single session. Plan for the onboarding calendar to extend across the first three to six months of a new trustee's tenure, returning to key topics as they become relevant in the board's actual work. A trustee who receives all the relevant information at once will retain very little of it.

Relationship-Building

Of all the elements of orientation, relationship-building may be the most consequential — and the most consistently overlooked. Trustees who feel genuinely connected to their colleagues are more willing to ask candid questions, more comfortable in difficult conversations, and more likely to stay engaged over time. Build explicit time and structure into your orientation for a new trustee to connect with fellow board members and key school staff, whether through a one-on-one conversation with the board chair or a structured gathering around the first meeting. You might also consider assigning a "trustee mentor" to new trustees - someone other than the Board Chair (who already carries so much!) who can be the new trustee's point of contact for all of their questions. More on this later.

Also, be attentive to the psychological experience of joining a new board. Some new trustees — particularly those newer to formal governance or whose backgrounds differ from the existing majority — may feel uncertain about whether they know the unwritten rules, or whether their perspective is genuinely welcome. Your orientation should work against this.

"When we recruited new trustees, we noticed that some felt nervous about speaking up. We worked hard to normalize asking questions and engaging in conversations so new trustees felt comfortable doing so."

Create explicit space for questions and signal clearly that every trustee's voice is expected and valued.

Key Knowledge

New trustees need a solid foundation of substantive knowledge to fulfill their governance responsibilities. Your orientation should cover:

- **The governance role:** What does it mean to govern rather than manage? This distinction is foundational and one that many new trustees, especially those with strong professional expertise, genuinely struggle with at first.
- **Core school documents:** The charter, bylaws, strategic plan, most recent audit, annual report, and DESE accountability documents. Provide these in advance, not on the evening of a new trustee's first vote. Give the new trustee time to review and ask questions.
- **Board norms and practices:** Share the board's Code of Conduct, key policies, and any operating agreements that help new trustees understand they are joining a collective governance body with shared expectations. Many of these norms may be written down (that should be a goal of the board!); others may be unspoken. Enlist the help of a trustee mentor to help with the unspoken ones!
- **The broader education context:** New trustees benefit from understanding the charter sector landscape, the school's accountability framework, and the key regulatory relationships that shape the board's work. They may also need to learn more about the forces at work in the broader education sector - your local district, the state of MA, or the federal government.

"Years ago, one of our new trustees noted how many acronyms our school used - and he was having a hard time keeping up! Our Executive Director created a board dictionary that we still share with every new trustee. Its so helpful!"

- **Technology and logistics:** Ensure new trustees are set up on all board platforms before their first meeting. Technical confusion creates unnecessary barriers to engagement, and can quickly leave a new trustee believing things are not organized at the school.
- **A school tour with the Executive Director:** If a new trustee has not yet visited the school, make this an early priority. Even if the trustee has visited the school, they may not have had an in depth tour with the school leader. Do it now. Governing an institution you have never seen is harder than it sounds.

Centralized and Digital Board Information Repository

One of the most practical steps a board can take to support new trustee onboarding is maintaining a centralized digital repository — a single location where all critical board documents are organized and accessible. Some boards use paid platforms to gather this information; others use a tool like Google to create a “digital hub.” Whatever you choose to do, the concept is simple: every document a new trustee needs to get up to speed should be findable in one place, accessible at any time, without having to ask.

The digital hub (whether homegrown or part of a paid platform) serves multiple purposes. It is the backbone of orientation training, giving new trustees a place to review materials before their first sessions. It is an archive of the board’s most important records. And it can serve as a practical tool during the recruitment process, demonstrating to prospective trustees that the board is organized and well-run. The Governance Committee Chair should share the link to the digital hub with each new trustee upon joining and resend it at least one week before any formal orientation session, with a specific suggestion to review materials in advance.

Your digital hub should include, at minimum, the following:

- **Board members:** Names, contact information, offices held, term lengths, and short bios for all current trustees; the same for the school leader and leadership team; committee lists with chairs and contact information; and MCPSA contact information including your Board Governance resource.
- **Calendar:** All board and committee meeting dates; school events trustees are expected or encouraged to attend; key dates and milestones for board and committee goals.
- **Job descriptions:** For the full board, officers, individual trustees, committees and committee chairs, and the school leader and leadership team.
- **School information:** The charter; mission, vision, and values; a brief history of the school; a description of the academic program; student demographic and performance data; the strategic plan; the organizational chart; the most recent annual report; and relevant news links and charter sector context.
- **Finance and fundraising:** Recent financial reports; the most recent independent audit; current and prior-year budgets; the long-range financial plan; key bond, loan, and lease documents; and a list of key funders and partners.
- **Legal and policy documents:** Bylaws and key policies (conflict of interest, confidentiality, student discipline, school leader evaluation); succession plans; all legally required records including meeting minutes; Directors’ and Officers’ Liability insurance information; and links to DESE’s charter school materials for boards.

The **Appendix** to this guide includes a complete digital hub checklist your board can use to audit what you currently have in place and identify gaps. Even if you are starting from scratch, a simple shared folder with the key documents organized by category is a meaningful improvement over no organization at all.

Board Culture

Every board has a culture — a set of norms and ways of working together that shapes how it functions. One of the most consequential things your orientation can do is help a new trustee understand and internalize that culture: how decisions are made, how disagreement is handled, whose voices tend to be heard. These are worth naming explicitly rather than leaving new trustees to piece together on their own.

Boards that have worked hard to build a healthy culture are rightly protective of it. A new trustee who does not understand the culture — or who brings a very different set of assumptions about how governance should work — can inadvertently disrupt dynamics that took years to build.

"We know that if we aren't careful, we might add board members who bring down our healthy board culture. We are deliberate about explicit about what our culture looks like so we don't inadvertently lose it."

Creating a Trustee Mentor Program

One of the most effective investments a board can make when onboarding new trustees is pairing each incoming trustee with an experienced board member who can serve as a guide, thought partner, and cultural interpreter during the first year. Even thorough formal orientation cannot replicate the value of a veteran trustee explaining, in the moment, how the board typically approaches a certain kind of decision or providing context that does not exist in any document. As one board leader described: "A lot of execution has to do... with relationships."

"When I joined our board, I felt behind. I had a hard time keeping up with the education lingo! And then I connected with another board member - who was so patient with me as I learned. So when I helped design our new trustee orientation, I made sure to add a trustee mentor into the process!"

Mentor selection deserves care. Not every experienced trustee is the right mentor for every new one. When identifying pairings, consider whether the potential mentor is genuinely available and willing, whether there is a natural connection between the two individuals, and whether the mentor models the governance practices and board culture you aspire to. Resist the impulse to simply assign the most senior board member — think about fit. One practical approach is to match new trustees with committee chairs or experienced committee members, creating a natural overlap between mentoring and committee work.

Once pairings are established, set clear expectations for both: how often they should connect (monthly is a reasonable baseline), what topics the mentor should address proactively in the early months, and check in points to ensure the new trustee is feeling supported. A light touch is often more effective than a structured curriculum — the most important thing is that the new trustee knows they have a specific person they can call.

If the board has a staff member who supports board operations, also designate that person as a practical resource for new trustees — someone they can go to with logistical questions without drawing on their mentor's time for every small thing. Don't assume new trustees understand the staff role — often, trustees don't even know how what work is happening behind the scenes, let alone who is getting it all done.

Onboarding with an Equity Lens

Strong onboarding is not only about what you teach new trustees; it is also about whether all trustees have a genuine and equal opportunity to contribute meaningfully once they join. Many boards, even well-intentioned ones, have practices that inadvertently favor trustees who already possess certain advantages — existing board relationships, prior governance experience, or professional backgrounds that align easily with the board's existing culture. Trustees who arrive without those advantages can face unspoken barriers to full participation.

"Once we started doing DEIB work with our board, we realized we had to recognize our own privileges, too. We changed our recruitment and onboarding practices to make sure we could welcome and engage a truly diverse set of trustees."

Addressing this challenge requires intentionality at every stage. During recruitment, seek candidates through channels beyond your existing network. During the approach, communicate expectations consistently regardless of what you assume a particular candidate already knows. During orientation, name the experience of feeling like an outsider directly and ensure norms are written down rather than assumed. In mentoring relationships, be especially thoughtful about pairing newer or less-connected trustees with mentors who can help them navigate the unspoken rules of board culture.

The goal is not simply to recruit trustees from a broader range of backgrounds and then onboard them the same way as everyone else. It is to build a process that genuinely prepares every trustee to contribute — one that recognizes different starting points and actively works to ensure that background or communication style is never a barrier to full participation. Boards that genuinely integrate a range of perspectives make better decisions. Equitable onboarding practices are how you get there.

Seeking Feedback, Improving Over Time, and Getting Started

No onboarding process is fully formed the first time you build it. The most important habit you can develop is creating a consistent feedback loop so you can learn and improve. The Governance Committee should check in with new trustees at the three- and six-month marks to ask what has been most useful, what has felt confusing or missing, and what they understand now that they wish they had known earlier. Include questions about the onboarding experience in your board's annual self-evaluation to identify patterns over time — are there knowledge gaps that consistently surface in a new trustee's first year? Are new trustees generally feeling prepared and welcomed? Use what you hear to improve what you do.

I think we've done reasonably well building a welcoming culture - but when a new trustee asked, "what is my job in this situation?", I knew we still had more work to do around new member training.

Onboarding a new trustee well requires genuine effort: thinking ahead rather than reacting to vacancies, experienced board members investing time in their colleagues, honest examination of whether your processes work equally well for everyone, and sustained commitment to improvement. That effort is worth it.

A trustee who has been well-onboarded understands their role, knows their colleagues, feels connected to the school's mission, and is prepared to take on increasing responsibility over time. Conversely, a trustee who arrives without adequate orientation or support may never quite find their footing — they may disengage, make well-intentioned but uninformed governance decisions, or leave before their term ends, creating a vacancy to fill all over again.

You do not need a perfect process to begin. Build what you can with what you have: a clear conversation about expectations during recruitment, a structured orientation over the first few months, a thoughtfully chosen mentor, and a genuine feedback loop. Add to it over time. MCPSA is here to support this work — explore our full library of board resources and training offerings, and reach out with questions as they arise.

Because when trustees are well-prepared, informed, and genuinely connected to the work of the board — governance improves, and the school's ability to serve its students improves too.

Appendix: Board Digital Hub Checklist

Use this checklist to audit your current digital hub (or shared board document repository) and identify gaps. Aim to have all items below accessible in one organized location before a new trustee's first day. Items marked with an asterisk (*) are particularly important for new trustees to receive early in the onboarding process.

BOARD MEMBERS

- ☐ Names, contact information, offices held (treasurer, secretary, etc.), term lengths, and short bios for each current board member *
- ☐ Contact information and short bio for the school leader *
- ☐ Lists of committees and the chair for each, including contact information for any non-board members *
- ☐ Contact information for MCPSA, including Robert Carpenter, the board governance expert

CALENDAR

- ☐ Board and committee meeting dates *
- ☐ School events trustees are expected or encouraged to attend (performances, demonstrations, portfolio evaluations, etc.)
- ☐ Key dates and milestones for all board and committee goals

JOB DESCRIPTIONS

- ☐ The full board *
- ☐ Officers
- ☐ Individual board members *
- ☐ Committees and Committee Chairs
- ☐ School leader and leadership team
- ☐  Board Composition Matrix - TEMPLATE

SCHOOL INFORMATION

- ☐ The school's charter *
- ☐ Mission, vision, and values *
- ☐ Short history of the school — how, why, and when it was founded; results to date; any events of significance
- ☐ Short description of the school's academic program
- ☐ Link to DESE's student demographic data for the school
- ☐ Summary of student performance data: DESE accountability data, authorizer performance reports/ratings, most recent academic reports to the board *
- ☐ Strategic plan *
- ☐ Organizational chart
- ☐ Most recent annual report *

- ☐ Links to relevant news articles about the school, the charter sector, and the relevant policy context

FINANCE AND FUNDRAISING INFORMATION

- ☐ Financial reports, including most current and previous six months
- ☐ Most recent independent audit report *
- ☐ Budget for the current year and previous one to three years *
- ☐ Long-range financial plan
- ☐ Key bond, loan, and lease documents
- ☐ Names of current key funders and partners

LEGAL AND POLICY DOCUMENTS

- ☐ Bylaws *
- ☐ Key policies: conflict of interest, confidentiality, student discipline, school leader evaluation, etc. *
- ☐ Succession plans for school leader and board chair
- ☐ All legally required documents, including meeting minutes
- ☐ Directors' and Officers' Liability insurance certificate
- ☐ Links to DESE's charter school website, including materials specific for boards *

Sample Task List for Board Mentors:

Task	Owner	Timeline	Notes	Link to Resource
Background check info/forms				< Insert Link for your Board >
Submit letter to DESE to request approval of new member(s) by Commissioner (including resume and disclosure of financial interest forms)				Request Letter Template for Approval of New Board Members
Complete all DESE training requirements				DESE Board Member Training Page
DESE forms & disclosures submitted				Required Forms
Board meeting schedule and calendar invites sent				< Insert Link for your Board >
Board orientation session scheduled				
Board mentor assigned				
First meeting with board mentor				
Resource guide shared				< Insert Link for your Board >
MCPSA New Board Member PD Session				MCPSA New Board Member Resource

