

III. New Member Onboarding

A. POLICY

1. Onboarding procedures teach new members about the Area Agency on Aging, the broader aging services network, and the role of the Commission.
2. Orienting new members to their responsibilities and pairing them with a Passport Coordinator improves retention by helping them feel more connected and committed to the Commission.

B. PROCEDURES

1. Orientation with Commission Chairperson
 - a. Orientation may be in person, virtual, or by email.
 - b. Completed as soon as possible after a new member is appointed or elected, not later than the second month of membership.
 - c. Commission Chairperson:
 - i. Shares links to online member resources including meeting agendas, bylaws, policies and procedures, and mission statement.¹
 - ii. Emphasizes policy on Member Commitment and confirms date of next Commission meeting.
 - iii. Provides the New Member Orientation Passport form and pairs the new member with a Passport Coordinator.
 - a) When selecting a Coordinator, the Chairperson will consider the experience and knowledge, interests, supervisorial districts, and availability of the Coordinator and the new member.
 - b) Serving as a Coordinator is voluntary.
 - c) Any member may serve as a Coordinator.
 - d) At any time, a Coordinator may be replaced at the request of the new member, the Coordinator, or the Commission Chairperson.
2. Training with AAA Program Manager
 - a. Training may be in person or virtual.
 - b. Completed as soon as possible after a new member is appointed or elected, not later than the second month of membership.
 - c. The AAA Program Manager reviews:
 - i. Staff roster and roles – who does what?

¹ <https://sonomacounty.ca.gov/sonoma-seniors>

Sonoma County Aging & Disability Commission
Policies & Procedures

- ii. Reimbursement policy and procedure
 - iii. Conflict of Interest policy and procedure
 - iv. Required trainings
 - a) Security Awareness
 - b) Ethics
 - c) Elder and Dependent Abuse
 - v. The Area Agency on Aging
 - a) Funding
 - b) Programs
 - c) Monitoring
 - vi. The Area Plan
 - vii. The Aging & Disability Resource Hub
 - viii. The Local Master Plan for Aging
 - ix. The Local Aging & Disability Action Plan
 - x. The Commission's role in the above
3. Ongoing contact with Passport Coordinator
- a. Check-ins may be in person, virtual, or by email.
 - b. Started as soon as possible after the Coordinator is assigned and continuing at least monthly until passport is complete.
 - c. Passport Coordinator:
 - i. Confirms that the member has the New Member Orientation Passport form and understands how to use it.
 - ii. Confirms that the member completes an orientation with the Commission Chairperson and a training with the AAA Program Manager.
 - iii. Assists the member to learn about all items on the passport and answers other questions.