

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 mentor 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. Pairs the new member with a Commission Mentor.
 - a) When selecting a Mentor, the Chairperson will consider the experience and knowledge, interests, supervisory districts, and availability of the Mentor and the new member.
 - b) Serving as a Mentor is voluntary.
 - c) Any member may serve as a Mentor.
 - d) At any time, a Mentor may be replaced at the request of the new member, the Mentor, or the Commission Chairperson.
2. Mentoring with Commission Mentor
 - a. New members are welcome to talk to and learn from any Commission member as well as the AAA Program Manager.
 - b. New members are paired with an experienced Commission member who serves as their Commission Mentor for the first year of their membership.
 - c. Mentoring Meetings

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

Sonoma County Aging & Disability Commission
Policies & Procedures

- i. Mentor schedules first meeting with the new member as soon as possible, not later than the second month of membership.
 - ii. Mentor schedules additional meetings at least monthly, possibly more often in the beginning.
 - iii. Meetings should be in person or virtual for at least the first three months, with phone calls or emails after that as appropriate, ending not sooner than the twelfth month.
- d. Mentor Responsibilities – Months One and Two
 - i. Review parliamentary procedure
 - a) Definition of quorum
 - b) Making motions
 - c) Voting
 - d) Brown Act: Conducting the public's business in public
 - e) Remote attendance policy
 - ii. Check in with the new member before and/or after Commission meetings.
 - a) Ensure new member is receiving agenda packets and knows where to find them online.
 - b) Review agenda for upcoming meeting. Look for items marked "Action."
 - c) Encourage the new member to prepare for discussions and voting.
 - d) Answer the new member's questions.
 - iii. Introduce the new member to other Commission members, County staff, and community partners.
 - iv. Review Commission bylaws, policies and procedures, and mission statement. Emphasize:
 - a) Member commitment and attendance
 - b) Volunteer time log
 - c) Officers and officer duties
 - v. The first week of each month, email a Mentor Report to the Commission Chairperson. Number the monthly reports 1 through 12 over the course of one year of mentoring. For each report, summarize:
 - a) Contact with new member
 - b) Topics discussed

- c) Items for follow up
 - d) Plans for upcoming month
 - e. Mentor Responsibilities – Months Three and Four
 - i. Maintain contact with the new member at least monthly.
 - ii. Review Commission meeting preparation and participation.
 - a) Is the new member comfortable making and seconding a motion? Participating in discussions? Voting?
 - b) Is the new member getting to know other Commission members and community partners?
 - iii. Discuss committees:
 - a) Review the difference between standing committees and ad hoc committees.²
 - b) Review policy and procedures for Standing Committees, including Executive Committee members and duties.
 - c) Invite the new member to observe Executive Committee meetings in person or virtually.
 - d) Discuss how the new member may meet their commitment to always be serving on at least one committee.
 - iv. Continue monthly reports to Commission Chairperson.
 - f. Mentor Responsibilities – Months Five and Six
 - i. Maintain contact with the new member at least monthly.
 - ii. Review the Commission's annual work plan objectives and implementation plan. Consider how the new member may participate in activities.
 - iii. Ensure the new member is familiar with 565-INFO and the Aging & Disability Resource Directory.
 - iv. Continue monthly reports to the Commission Chairperson.
 - g. Mentor Responsibilities – Months Seven through Twelve
 - i. Maintain contact with the new member at least monthly.
 - ii. Discuss how the work of the Commission fits with the new member's personal goals. What else do they think the Commission should be working on?

² Commission Bylaws Article VI

- iii. Explore how the new member would like to contribute to the Commission in the future, e.g. leading an ad hoc committee, recruiting new members, running for an officer position.
 - iv. Review the Commission's relationship with the Local Master Plan for Aging. Is the new member interested in serving on an Action Team?
 - v. Continue monthly reports to Commission Chairperson.
3. Training with AAA Program Manager
- a. Trainings may be in person or virtual.
 - b. The first training is completed as soon as possible after a new member is appointed or elected, not later than the second month of membership. The AAA Program Manager reviews:
 - i. Staff roster and roles – who does what?
 - ii. Reimbursement policy and procedures
 - iii. Required trainings
 - a) Security Awareness
 - b) Ethics
 - c) Elder and Dependent Abuse
 - c. By the new member's third month, the AAA Program Manager will complete at least one more training (more if needed) to describe:
 - i. The Area Agency on Aging
 - a) Funding
 - b) Programs
 - c) Monitoring
 - ii. The Area Plan
 - iii. The Aging & Disability Resource Hub
 - iv. The Local Master Plan for Aging
 - v. The Local Aging & Disability Action Plan
 - vi. The Commission's role in the above