



ONBOARDING CHECKLIST

New Starter:	Role:
Date:	Mentor:

NOTE: The BDLGA Secretary is responsible for arranging the onboarding of all new Management Committee members.

STEP 1

Before they start

A positive induction begins **before** the first meeting or event attended. Prepare the basics so the new person does not have to chase information or guess what happens next.

Welcome and prepare

- ☐ **Confirm the role:** Provide a clear role function listing key responsibilities, likely time commitment and any key dates or recurring commitments with the specific role.
- ☐ **Send a welcome message:** Include the first meeting date, location, what to bring or wear and who will meet them.
- ☐ **Choose a contact person:** Nominate an onboarding mentor or buddy who can answer questions and provide support.
- ☐ **Prepare the team:** Let existing committee members know the new person is joining and arrange introductions.
- ☐ **Ask what support they need:** Check availability, accessibility needs, preferred communication method and any practical requirements.
- ☐ **Prepare practical items:** Request shirt size and order shirt (uniform), name badge ± equipment access where relevant.

Handover and access

- ☐ **Prepare the handover:** Ask the outgoing role holder (or another experienced person) to summarise current tasks, deadlines, contacts and unfinished business.
- ☐ **Set up access:** Provide system access the person needs i.e. Gmail, website access to Management Committee gated pages ± access to finance system (MYOB), Golf Genius, website, social media, etc. depending upon the role they are taking on as well as contact details for Conetix and White Peak Digital.
- ☐ **Secure old access:** Remove access for people who no longer need it and update passwords or administrator permissions where appropriate.

- **Share the calendar:** Provide meeting dates, event dates, reporting deadlines as necessary and other important commitments.

Share access to only the essential pre-reading

- Role Function outline.
- Code of conduct and any policy they must understand before starting.
- A strategic plan or short overview of the organisation, its purpose, values and current priorities.
- The Constitution, By-Laws and key governance information.

Avoid the information dump

Separate information into three groups: need to know before starting, need to know during induction and useful to know later. A smaller, well-explained pack is more useful than a large folder with no context.

STEP 2

The induction session

Use this core checklist for everyone. The depth of each item will depend on the role.

A simple induction agenda

Suggested 45-60 minute agenda

- Welcome and explanation of Management Committee membership.
- Organisation's purpose / values, membership and current priorities.
- Role, responsibilities and expectations.
- Safety, conduct and compliance.
- Systems, communication and practical arrangements.
- Questions, next steps and first check-in.

Keep the session useful

- Explain why information matters, not just where it is stored.
- Use examples relevant to the person's role.
- Show them where to find answers later.
- Leave space for questions.
- Do not try to explain everything in one sitting.

Welcome and belonging

- Explain personal introduction with key people will be undertaken at first meetings attended.
- Clarify only physical facilities held by BDLGA include a PO Box and storage facility.
- Explain where the role fits within the wider team and who they can turn to for support.

Role clarity and communication

- Clarify the role and explain outgoing person will provide further details about main responsibilities, expected time commitment, priorities and what is outside the role.
- Clarify authority i.e. what decisions they can make themselves and what requires approval or escalation.
- Confirm the main channels used are Gmail and mobile phone, how meetings are communicated and the best way to secure an urgent response.

- Set expectations i.e. what the association expects and ask what the new person expects from their role and the association.

Safety, conduct and essential compliance

- Code of Conduct, respectful behaviour and meeting procedures.
- Role-specific hazards, any required training and incident reporting
- Child safety or working-with-children requirements where relevant.
- Confidentiality, privacy and appropriate handling of information.
- Any role-specific requirements e.g. **Blue Card**, checks, declarations e.g. **Office of Fair-Trading Form 10a** submission or acknowledgements.

STEP 3

Management Committee onboarding

Management Committee members need more than a handover of tasks. They need enough context to participate in **governance**, **make decisions** and **understand their responsibilities**.

Governance essentials

- **Legal structure and not-for-profit status:** Explain how the association is structured and what that means in practice.
- **Constitution and governing documents:** Show what is covered by the Constitution, By-Laws, policies, delegations and other rules, and how they work together.
- **Duties and liabilities:** Cover acting in the organisation's best interests and in good faith, reasonable care and diligence, proper use of position and information, solvency and conflicts of interest.
- **Governance versus operations:** Clarify the committee's role in direction, oversight and accountability and where operational responsibility sits.
- **Strategy and risk:** Explain the strategic plan, current priorities, major risks and how progress is monitored.
- **Key obligations:** Outline relevant affiliation, regulatory obligations, insurance, child safety, workplace health and safety or other compliance requirements.

Meetings and decision-making

- Meeting calendar, attendance expectations and any subcommittees or working groups.
- How agendas and papers are prepared and when they are distributed.
- Quorum, voting, minutes and how decisions are recorded and followed up.
- How conflicts of interest are declared and managed.
- How members raise questions, request information and add items to the agenda.

Financial and organisational context

- Current budget, recent financial position and how financial reports are presented.
- Financial delegations, bank authorities and who can approve expenditure.
- Honorary Criteria, leases, $\pm$ funding commitments relevant to the committee.
- Key stakeholders, external relationships and significant upcoming deadlines.

The committee information pack should be a map, not a storage box

During induction, show new members what each document is for, which ones they need to read now and where the current version is kept.

PRACTICAL TOOL

Management Committee information pack essentials

A useful committee pack gives new members the core information they need to understand the association and contribute to decisions.

Core governance documents

- Constitution and By-Laws.
- Current strategic plan or annual priorities.
- Committee charter, role descriptions and delegations.
- Code of conduct and conflict of interest requirements.
- Key policies relevant to governance and member safety.
- Summary of major organisational risks.

Current organisational information

- Current budget and recent financial reports.
- Organisation chart and key contact list.
- Annual committee meeting calendar.
- Recent agendas and minutes.
- Insurance summary.
- Major contracts, licences and funding obligations where relevant.

Management Committee pack checklist

- ☐ The documents are current and clearly dated.
- ☐ The new member knows where the master versions are stored.
- ☐ Key documents are explained during induction rather than simply emailed.
- ☐ Only relevant documents are included - avoid duplicating everything the organisation has.
- ☐ A calendar identifies major meetings, deadlines and annual governance tasks.
- ☐ Key contacts identify who to ask about governance, finance, operations and member issues.
- ☐ Confidential material is stored and shared appropriately.
- ☐ The pack is updated when policies, office bearers or major organisational details change.

Questions to cover before the first meeting

- ☐ What decisions are coming up in the next one to two meetings?
- ☐ Are there any current financial, legal, safety, people or reputational issues I should understand?
- ☐ Which papers should I read closely before my first meeting?
- ☐ What is expected of me between meetings?
- ☐ Who can I contact if I need context before a meeting?

Tip for outgoing office bearers

Leave a short handover note that explains the **rhythm** of the role: the tasks that happen every month, every quarter and once a year, plus the next three things the incoming person needs to do.

STEP 4

The first term of appointment

Induction should continue after the first discussion. Short check-ins help new people build confidence, clarify expectations and raise questions before small issues become frustrating.

First month

- ☐ Check they can access the people, documents and systems they need.
- ☐ Ask whether the role matches what they expected.
- ☐ Clarify the one or two most important priorities for the next few months.
- ☐ Answer practical questions and correct any early misunderstandings.

Months two to six

- ☐ Ask what is still unclear or difficult.
- ☐ Check whether the workload and time commitment are realistic.
- ☐ Provide specific feedback and recognition.
- ☐ Arrange any further mentoring and/or training.
- ☐ Invite feedback on the induction process and improve it for the next person.
- ☐ Agree on any ongoing check-in or support arrangements.

Eight useful questions for a new starter to ask

- 1 What does doing a good job in this role look like?
- 2 What are my priorities for the next 1 to 6 months?
- 3 What decisions can I make myself and what needs approval?
- 4 Who should I contact when I am unsure?
- 5 What are the biggest current issues or risks I should know about?
- 6 Which policies or procedures are essential for my role?
- 7 Where are the key documents, records and previous work kept?
- 8 What do people who have done this role before wish they had known at the start?

Schedule the check-in before the induction ends

A date in the calendar is more reliable than saying “come and see me if you need anything”.