



Board Skills Matrix

An effective nonprofit Board is comprised of individuals who share an interest in the organization's mission, yet bring together unique perspectives, insights, and skills based upon their own backgrounds and experiences. When filling a Board position, it is helpful to know what skills you currently have on the team and what skills you may need. This will help you to enhance your fundraising capabilities, as well as to make effective strategic management and financial decisions.

However, it's hard to keep track of every board member's skills, demographics, personal attributes, and other skills and abilities. This is where creating a Board Matrix is really helpful.

What is a Board Matrix?

In its simplest form, a Board Matrix is a database of skills, experience, and even demographics that the current board brings to the organization. This allows you to identify areas of skill that you still need to add to round out the strengths of the Board.

An easy way to set up a Matrix is to use a spreadsheet program, such as Microsoft Excel or Google Sheets. The rows list specific characteristics, and the columns list the Board members names. This provides a visual map of directors' skills and attributes that can be easily assessed.

Key Factors to Consider

Determine what specific data you want the matrix to contain. It can be as simple or detailed as you want, but focus on functionality. What information would be most useful to know about the composition of your Board?

Among the key factors to consider are an individual's:

- Business experience and expertise: nonprofit finance and governance, business development and fundraising, marketing, law, human resources
- Connections: academia, foundations, community, business
- Characteristics: leadership, strategic thinking, problem solving
- Demographics: age, gender, race, ethnicity, and geography
- Passion: personal experience with your mission/constituents

Creating Your Matrix

A quick way to do this is to create a form via Microsoft Office or Google Forms, and ask each Board member to fill it out with their own information at the first Board meeting of the year. You should update the the Matrix annually.

Using Your Matrix

Each Board member should have a copy of the Matrix in their Board binder. During your Board meetings, it will be helpful to pull it out when having discussions about recruiting. (Board recruiting should be on the agenda at the majority of your meetings). Throughout the year, every Board member should be keeping an eye out for potential new members to fill open positions, and also be aware of any upcoming vacancies due to term expiration of current members. Reviewing your Board Matrix can help illuminate areas of skill, expertise, and diversity that are lacking (or are in overabundance) in your current Board's makeup. This data can be beneficial to your Nominating Committee.

You can find many examples and templates of a Board Skills Matrix by searching online. The sample below comes from www.joangarry.com.

	A	B	C	D	E	F	G	H	I
1	Board Skills Matrix								
2									
3	Board Member	<i>Board Member Name</i>	<i>Board Member Name</i>	<i>Board Member Name</i>	<i>Board Member Name</i>	<i>Board Member Name</i>	<i>Board Member Name</i>	<i>Board Member Name</i>	<i>Count</i>
4	Term Ends	6/30/2016	6/30/2016	6/30/2017	6/30/2016	6/30/2017	6/30/2017		
5	Expertise								
6	Finance and accounting							0	
7	Fundraising—events							0	
8	Fundraising—individuals							0	
9	Governance							0	
10	Human resources							0	
11	Information technology							0	
12	Law							0	
13	Leadership development							0	
14	Marketing							0	
15	Media relations							0	
16	Meeting procedures							0	
17									
18									

This example is from a template available online from JoanGarry.com.

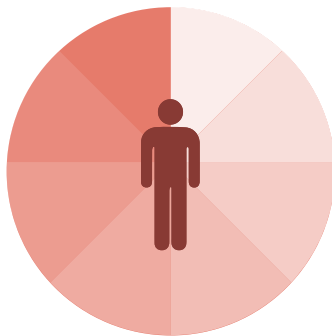
Additional Things to Consider

According to an article on Blue Avocado.org, there are three traps to avoid when using a Matrix to help in the Board recruitment process.

It warns against falling into “*the skills trap*” where valuing an individual’s competence in a certain field or level of achievement outweighs other equally important considerations.

The second trap to avoid is “*the demographic trap*” which has the potential to prompt a Board to fill a position with someone who “fits” the right demographic on paper, but lacks the passion or interest to be an active, engaged Board member.

The third trap is “*the connections trap.*” Just because it’s known that someone made a large donation to one or more other charities, or has connections to wealthy or highly-influential people, it’s no guarantee that individual would be a good fit to fill a position on your Board of Directors.



A Board Matrix can be an important tool for your organization when developed wisely and used carefully. However, remember that Board members are individuals.

What an individual will do to serve your organization is more important than any single skill, title, connection, or other attribute an individual may possess.