



# Strategic Board Recruiting

No decision you make regarding your nonprofit organization carries more importance than who is chosen to lead it. The members of your Board of directors make up the governing body of your nonprofit and are legally accountable for its actions. Practically speaking, they are accountable to your supporters and beneficiaries to oversee the accomplishment of the organization's purposes. The buck stops with them...at least it is supposed to! Board recruiting should be on the agenda for every Board meeting.

## Characteristics of Great Board Members

1. You must select people who share your sense of mission. If they do not care deeply about the very purpose of the organization, their value is minimal.
2. They must possess a certain level of business or organizational competency. It is not necessary for them to have prior experience as business *leaders*, per se, but they should understand principles of good business practices.
3. They should be long-game strategic thinkers.
4. They should be willing to give of their time *and money* to see the organization's mission accomplished.
5. They should always understand that their role is *governance*, not *management*. Governance establishes mission and programs, while management actively works those programs under accountability to governance.
6. And finally, they **MUST** be people of integrity.

## Evaluate Your Needed Skillset

The Board reviews the skill sets of the existing Board members, and the organization's Strategic Plan, and determines what skill sets they need to add to their team. It can be helpful to create a matrix that can be reviewed at each meeting.

- |                                      |   |
|--------------------------------------|---|
| 1. Administration/Management         | 11. Human resources                       |
| 2. Advocacy/public policy            | 12. Law                                   |
| 3. Education                         | 13. Marketing/public relations            |
| 4. Entrepreneurship                  | 14. Physical plant/facilities/engineering |
| 5. Financial management: accounting  | 15. Real estate                           |
| 6. Financial management: investments | 16. Social media                          |
| 7. Fundraising                       | 17. Strategic planning                    |
| 8. Nonprofit management/governance   | 18. Technology                            |
| 9. Government                        | 19. Community Connections                 |
| 10. Health care/medicine             | 20. Other                                 |

## **Create Your Recruiting List**

Board Members then create a list of donors, clients, volunteers, and former Board member referrals, and also evaluate their own network of friends, family, and business acquaintances to see if any would be a good fit to serve on the Board. This potential new Board member is now considered a candidate.

## **Initial Meeting with Candidate**

1. The referring Board director should contact the candidate to determine if they are interested in a Board position with the organization. If they would like to go ahead, the Board Chair should meet with each candidate, along with the Board member that has the relationship with the candidate. The President/Executive Director can also meet with the candidate at this time.

In this meeting, they should explain why they feel the candidate would be a good fit for the Board. They should communicate the expectations, roles and responsibilities of members and provide the Board Commitment Form, an application, and a current members list; annual report/brochure; and a Board job description.

## **Invite Candidate to Board Meetings, Check References, and Vote**

1. If the candidate is still interested in going forward, and the Board members see it as a favorable fit, the candidate is invited by the Board Chair to attend a Board meeting. The candidate is sent all of the materials for the meeting in advance. Time is left at the end of the Board meeting for some social interaction with members.

### **Meeting #1**

2. The Board Chair contacts the candidate to get their feedback and potential future interest and also asks for feedback from members and the President/Executive Director as to the candidate's fit.

3. If all the input is favorable, the candidate would be discussed and voted on at **Meeting #2** (the candidate does not attend).

4. If the consensus opinion is favorable, the candidate's references are checked. If the background check is favorable, the Board Chair contacts the candidate to confirm they are still interested and invite them to the next meeting where they are officially installed as a new Board member. **Meeting #3.**

## **Onboarding**

1. Following formal Board approval, the new Board member is given the Board manual and is assigned a mentor to help them onboard. The new Board member signs the Commitment Form, Conflict of Interest and Confidentiality statements.
2. The new member agrees to attend a training session conducted by the President/Executive Director to learn more about the organization. Some topics to cover could include: organizational chart, fundraising, financial management tools, executive director job description, the Board calendar, staff job descriptions, expectations of President/Executive Director for Board members, program overview, Strategic Plan documents and other types of accountability methods.
3. The mentor continues their relationship with the new member throughout that first year in order to answer questions and provide mentorship.

One more point concerning initial Board members: Not every person will have equal measure of the qualities outlined above. People are by nature more talented in certain areas. It is important to keep that point in mind as you appoint members and to shoot for balance. A Board over-weighted with visionaries will be all over the place. Likewise, a Board that tilts toward execution will lack for ideas.