

Effective Board Recruitment

Who do you recruit?

Step 1: Be clear on what “type” of board you’re seeking.

- Do you need a working board because you have little/no staff?
- Do you need a governance board that helps with big-picture strategy and doesn’t do much else?
- Do you need a finance/treasure board that’s mostly focused on raising and stewarding dollars?

Step 2: Identify the attributes you’re seeking that matches the type of board?

- Two attributes that should apply to **all** board recruits: time and passion for the mission.
- Specific skills, such as law, finance/accounting, human resources, communications, nonprofits.
- Representation (geographic, race, gender, income, religion, partisanship, etc.).
- Financial resources/Fundraising (if appropriate for your board type, which usually is the case)
- Relationships with (funders, community leaders, business leaders, industry sectors, etc.) **and** the willingness to be your ambassador to them.
- Types of thinkers (critical, synthesizer, strategic, detail-oriented).

Step 3: Use a matrix to identify what’s missing from your current board.

- Create a matrix listing what you’re seeking across one axis and current board members along the side, filling in what your current board provides. Focus on the gaps.
- For some skills, you may wish to always have redundancy (e.g. a treasurer role and someone who could step into that role if needed).

Step 4: Create a written statement of board responsibilities

- Reach board consensus on what the overall responsibilities of all board members are, as well as any specific major responsibilities for the upcoming 18 months. Put them in writing.

Step 5: Create a prospect list and a finders list.

- Brainstorm as a group who people the board/staff know who belong on the prospect list as someone who you think may be appropriate.
- Also brainstorm a “finders” list of people the board/staff know who would not be appropriate/available, but are likely to know people who are.

How do you recruit them?

Step 1: Expand your lists if necessary

- In general, the average Finder will successfully refer you to one board prospect.
- In general, you should expect to ask **at least 5** people to join your board for everyone who says yes. So if you need to fill 3 board slots, you should have at least 15 people identified on at least the prospect and finder lists together.
- If you don’t have enough, some strategies for getting additional prospects, include:
 - Advertising on email lists focused on boards and community volunteer opportunities.

- Posting on your facebook page or use your email list, allowing people to nominate themselves. (But make clear it's a competitive process, not something you get automatically if nominated).

Step 2: Meet with Finders or turn them into a Board Recruitment Task Force.

- Hold meetings with Finders to tell them about what you're seeking and ask for their ideas.
- Alternatively, invite them to a single "Task Force" meeting where 4-6 Finders hear from you about what you need and brainstorm together a list of prospects for you (where they are willing to make an introduction).
- Vet names from Finders or those self-nominated with your board before initiating contact. You may discover a board member knows somebody on the list and feels they'd make a *bad* board member. Or a fabulous one. You want to learn this before approaching them.

Step 2: Meet with Prospects (and those who've self-nominated).

- There is no substitute for an in-person meeting to discuss board service. Phone calls are a bad second choice that only makes sense if geography is a big challenge. Don't even consider making this ask by email. The best meeting involves both a board member and the Executive Director meeting with the prospect either together or in separate meetings.
- Don't ask prospects: "Will you meet with me to discuss board service." Ask: "Will you meet with me to hear about what's going on with NONPROFIT NAME so I can get your feedback and discuss whether you'd be an appropriate fit for becoming a volunteer leader or board member?"
- Before meeting, clarify in your mind what you think the potential board member would get out of board service and emphasize that in the meeting (e.g. key role in advancing the mission, prestige, personal relationships with interesting people, stimulating meetings, etc.).
- Use the written board responsibilities in the meeting and go over them with the prospect to make sure they understand them. Don't understate the responsibilities.
- Make sure the prospect understands you're not the final decision-maker – you'll take the information back to the board (or a board Nominations Committee) to see if it's a good fit taking into account competition with other people who are also being talked to about board service. Don't be a desperate date. Most prospects will also want time to think about it after a meeting.

Other Tips

- Someone needs to drive both the process of deciding who to recruit and implementing the recruitment process. Ideally, this will be the board chair or a board development/nominations committee chair. However, if the board isn't leading on this, it's incumbent on the Executive Director to do so.
- The Executive Director should staff any committee that meets about board recruitment. As an Executive Director, you don't want a runaway committee to go off on the wrong direction either in determining what's needed or in recruiting without your input.
- Keep a master spreadsheet not just of current finders and prospects, but a record of who's been asked and said no.
- Good board recruitment happens every year. Even if you have 3-year terms, you should assume there will be turnover that you need to add at least some people every year.
- Make sure you have a good board orientation process and make your board meetings themselves effective and interesting. The more engaged board members are, the less turnover you'll experience and the less you'll need to do new recruitment.