Board Recruitment
Expand Your Leadership Effectively
Recruitment
Board Recruitment

Outline the process

1. **Know What You Need**
   Consider your recruitment goals and specific targets for experience, skills, and diversity

2. **Reach Out**
   Given your goals, identify networks or groups that might have access to people who fit goals, in addition to internal and public outreach

3. **Evaluate/Interview**
   Define a process to get interest, evaluate candidates, and move potential members forward

4. **Select and Celebrate**
   Vote on candidates and then celebrate their inclusion

5. **Onboard**
   Ensure new members have the info and background they need to be successful
Tip #1: Set Goals

Know what you need

<table>
<thead>
<tr>
<th>Skills, Experience, Connections</th>
<th># of Applicants and Accepted</th>
<th>Diversity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set goals for the number of new members who will have specific skills, backgrounds, or personal networks</td>
<td>Set a recruiting goal for how many folks you want to apply and how many you ultimately want to select</td>
<td>Set a goal around who isn’t on the board that should be; consider race, gender, age, geographic location, sexual orientation, and other factors</td>
</tr>
</tbody>
</table>

Tip #1  
Target specific groups first

Tip #2  
Involve multiple board members

Tip #3  
Have a job description
Tip #2: Use a Board Matrix

Find out what you have

<table>
<thead>
<tr>
<th>Skills</th>
<th>Experiences</th>
<th>Networks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have board members check the areas they have mastery of, exposure to, and interest in</td>
<td>Board members can note personal demographics as well as things they have done (e.g. started a business)</td>
<td>Board members describe local professional, civic, or alum organizations they are active in currently</td>
</tr>
</tbody>
</table>
Tip #3: Try External Networks

Use pre-existing relationships

1. Pre-Existing
   Reach out to existing groups (e.g., alumni network) to spread the message

2. Job Description
   Make sure it is clear what they would be doing, the role the board plays, and what the organization does

3. Peer Organizations
   Look to see who is serving on the board of peer organizations, and consider if there are any trends

4. Post Online
   Post to job boards, but also community boards and explain why folks should be interested
Tip #4: Build Connections

<table>
<thead>
<tr>
<th>Personal</th>
<th>New</th>
<th>Easy</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Consider personal contacts you already know</td>
<td>• External networks engage members virtually and in real life, may feature you in newsletter</td>
<td>• Make it simple for them to partner</td>
</tr>
<tr>
<td>• People you meet at your own or community events</td>
<td>• Focus on telling networks your recruitment is active and what you’re looking for</td>
<td>• Give them a clear benefit</td>
</tr>
<tr>
<td>• Review your CRM to see donors or volunteers</td>
<td>• Goal is to get on their radar</td>
<td>• Also a clear next step</td>
</tr>
<tr>
<td>• Consider past partners in addition to personal contacts</td>
<td>• Send info over email then ask about meeting</td>
<td></td>
</tr>
</tbody>
</table>
Tip #5: Your Selection Process

Define the process

1. **Apply**
   - Have interested party send resume and note of interest

2. **Review**
   - Governance committee meets to review materials, preferably from a few candidates

3. **Interview**
   - Schedule a meeting with candidate and two board members

4. **Discuss**
   - Governance committee or similar group discusses interview and makes recommendation

5. **Vote**
   - At next board meeting, vote on candidate(s); vote virtually if needed if meeting is a while away

6. **Onboard**
   - Formally choose who is going to manage onboarding
Onboarding
Tip #1: Authentically Welcome

Build relationships early

**Celebrate**
Make time to welcome them and celebrate their joining; have board members reach out about excitement

**Introduce**
Send a group email introducing them, and then make time at start of next meeting as well

**Connect**
Build some time in for them to talk with other board members (social component) at next meeting

Tip #1
Celebratory tone

Tip #2
Involve multiple board members

Tip #3
Multiple times
Tip #2: Peer to Peer

Implement a “board buddy” program

1. Mentor/Buddy
   Choosing someone to help new board member(s) acclimate and engage

2. Facilitate
   Buddy does not need to know all the answers, but can help connect new folks with ED, Chair, etc.

3. Check-In
   Early on, pre-meeting, and post-meeting, then monthly for first few months

4. Relational
   Tactical role but also trying to make new members feel more welcome
## Tip #3: Handbook

### Useful resource

<table>
<thead>
<tr>
<th>Past</th>
<th>Current</th>
<th>Digestible</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 1-page organization history</td>
<td>• Minutes from last two meetings</td>
<td>• This can be a lot of material</td>
</tr>
<tr>
<td>• Last strategic plan</td>
<td>• Financials from past two months</td>
<td>• Let new members know what to prioritize</td>
</tr>
<tr>
<td>• 990, audit, or other end of year financial document from 2 years ago and last year</td>
<td>• Budget v. actual for YTD</td>
<td>• Encourage them to look it over, but not needed to be expert on it</td>
</tr>
<tr>
<td>• Any other important milestone documents</td>
<td>• Current budget</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Current strategic plan and/or annual goals</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Org chart</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 1-page program summary</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Board roster</td>
<td></td>
</tr>
</tbody>
</table>
Tip #4: Committee

Driving action and engagement

1. Focused
   Have a charter to set out roles and responsibilities

2. Post-Meeting
   New members should attend a meeting and then choose a committee

3. Meaningful
   Give them a meaningful task in this small group setting

4. Relational
   Encourage committee chair to use some time to connect members together

5. Voice
   Have committees own parts of the agenda

6. Check In
   Chair/Buddy/ED should check in about committee experience after 1–2 meetings
Tip #5: First Year

Building a timeline for onboarding

**Right Away**
Celebrate their inclusion and make introductions

**1-2 Months**
Board and committee meetings; buddy check-ins

**3-6 Months**
If not done already, commitment form and meaningful work

**6-12 Months**
Buddy ends, continue with Chair or ED checking in 1-2x

**1 Year**
Ask about first year and future leadership roles
Next Steps

Continue to build your board

1. Goals
   Set 1-3 goals for what types of candidates you need

2. Interview
   Have a selection process in place

3. Prep
   Get onboarding resources ready now

4. Plan
   Start recruiting 3-4 months earlier than you need to fill a role

5. Buddy
   Pair new members with a buddy

6. Draft
   A board member job description