

RECRUITING NEW BOARD MEMBERS **A Resource for Nonprofit Organization Leaders**

Overview

charitySTRONG, an online program of Governance Matters, a New York Council of Nonprofits affiliate, wants to help you recruit new board members who will advance the mission of your organization. It is important to establish a positive partnership with prospective board members from the start. This fact sheet is designed to help. It provides information about:

1. Defining Board Gaps and Qualities of New Board Members
2. Identifying and Assessing Candidates
3. Welcoming New Members

Part 1: Identifying Board Gaps and Qualities of New Board Members

In joining charitySTRONG, your organization has made a decision to attempt a new board recruitment strategy. You have likely designated a group of directors, typically a nominating or governance committee, to take the lead in identifying, assessing and proposing candidates. If this group is clear about recruitment objectives, skip to Part 2. But, if not, here are some questions to ask in creating board position descriptions for new candidates:

- ✓ Would more demographic, political, or professional diversity be helpful on your board; what type and why? How will you welcome participation of new members whose backgrounds and perspectives may differ from those of current directors?
- ✓ What types of leadership skills does your board need? For example, are you looking for candidates who have been involved in organizational start-ups or turnarounds? Would skills in community organizing, consensus-building or strategy be valuable?
- ✓ How high a priority is access to financial or other resources at this time and how will your organization communicate about this topic to candidates? Are you willing to bring on new or younger candidates who may not have access to financial resources now but may develop this as they advance in their careers?

Part 2: Identifying and Assessing Candidates

Post an Opportunity for Board Service on onBOARD and also search charitySTRONG's Candidate Bank periodically for candidates.

Once you have defined your board's needs, "post an opportunity" using the form that is on onBOARD, the board recruitment section of charitySTRONG's website. There is room on the form for background on your organization and board. This way, candidates that are looking for board positions can learn about your work and contact you via e-mail or through the charitySTRONG website. (Note that if candidates contact you, and you don't think they have the qualities that your board is looking for, please let them know within a week so they can find other options.)

You also should search the Candidate Bank on onBOARD to find resumes/applications of individuals who have already registered. Once you identify candidates you would like to speak with, contact them using the information at the top of their applications. (We also ask candidates to respond to inquiries within a week, even if they are not interested.) Because the pool of applicants on onBOARD continues to grow, we encourage you to check the Candidate Bank every couple of weeks.

Meet Candidates

The chief executive and at least one member of the nominating or governance committee, should meet with each prospective board member to learn more about the individual's personal qualities and professional experiences. Here are some questions you may consider asking:

- ✓ What prompted your interest in joining the board of a nonprofit?
- ✓ What interests you most about our organization?
- ✓ Tell us about some of the community service experiences you have had that have been most meaningful.
- ✓ Tell us about a difficulty you encountered at work or while volunteering; what happened; how did you address the situation; why?
- ✓ What skills and perspectives would you see yourself contributing as a part of our board?
- ✓ How much time do you have to be involved with our organization and do you anticipate changes to your availability?
- ✓ Do you have any concerns about joining a board and if so, what are they?
- ✓ If the board has specific fundraising or other requirements, ask the candidate about meeting them.

Educate Candidates about Your Organization

Each candidate should have a chance to see the organization’s “programs in action” which may involve seeing a class or performance, participating in an event, reading material from a campaign, or some other activity.

We suggest candidates review material on your website and social media. They may access your 990 through Guidestar.org. In addition, if you are seriously considering a candidate, it will be helpful to show them some of the following documents.

- ✓ *Strategic Plan or plan summary* -- This will help the candidate learn about the organization, its environment and major plans.
- ✓ *Audits or audit letters* -- This will help the candidate learn about the organization’s financial condition.
- ✓ *Annual Report* -- If it is already on your website, there is no need to provide it; smaller and newer organizations might not have annual reports.
- ✓ *By-Laws* -- These will provide basic information about board composition, operations and structure.
- ✓ *Board Policies and Requirements* -- Board Job Descriptions; Conflict of Interest, Whistleblower, Give or Get – These documents clarify essential responsibilities.
- ✓ *Board Calendar, including Meeting Location and Times*

Assess Candidate “Fit”

Sometimes it is helpful to have a written tool to document responses to a candidate. This is especially helpful when multiple board members meet a candidate.

<i>Skills and Interests</i>	<i>Rating (Low – High)</i>
Shows interest in our mission	
Has gained some understanding of our work	
Possesses skills needed by our board	
Has connections in the community	
Shows interest and willingness to fundraise and/or donate	
Prior community involvement (direct service, an advisory group or junior committee, etc.)	
<i>Personal Qualities Rating</i>	<i>Rating (Low – High)</i>
Ability to listen	
Ability to express ideas and opinions clearly	
Ability to participate effectively in a conversation	
Sense of humor and positive attitude	
Availability to participate in board work	

Part 3. Welcoming New Members

When you are ready to extend an offer to a candidate, make sure that there is clarity about all responsibilities. Some organizations elect directors once per year and others have more flexibility. You should let candidates know what to expect.

You may also meet candidates whom you believe are not yet ready for your board. If you do want to involve these individuals in your organization, consider whether there are other options. Many candidates are interested in committees and associates groups, so consider these activities when appropriate. And remember, as noted above, if there is not a good fit, there is no obligation to extend an offer of any type. In this case, please let a candidate know that you will not be moving forward and provide feedback that you think will be helpful.

Provide a Comprehensive Orientation

Your new board members will not be successful without a thoughtful orientation process. To this end, prepare a board manual (hard copy or electronic) with key documents, including the items we list above, minutes of recent board meetings, program summaries and evaluations, descriptions of key fundraising events, etc. The Directors U Resource Library has several fact sheets related to orientation manuals and procedures. Another suggestion is a board mentorship where new board members are paired with more experienced directors for guidance. If you are bringing on several new directors at once, hold a formal orientation session and consider a social opportunity for them. This will help new members bond with each other and some long time members and smooth the pathway to getting involved.

Sources

BoardSource, *Board Matrix Template*. Available at www.boardsource.org

BoardSource, *Recruiting Board Members*. Available at www.boardsource.org

Leadership Niagara, Candidate Evaluation Form, 9/18/14.

MAP For Nonprofits, *Ten Dimensions that Shape Your Board*. Available at www.mapfor nonprofits.org

NYC Nonprofit Assistance, *Capacity Building Resource Guide for Nonprofit Partners, Candidate Interview Questions, Recruitment Procedures and Board Handbook Contents*. Available at www.nycservice.gov