



RECRUITING THE RIGHT BOARD MEMBERS

Ensuring that the board has the “right” members is one of the board’s most important responsibilities.

Unfortunately, many boards approach recruitment as a task to complete only when current board members’ terms expire – a strategy that often leads to last-minute scrambling to find candidates who are simply willing to serve, never mind fit the organization. This can be a downward spiraling action, both for the board and the organization.

High-performing boards approach recruitment as a year-round board responsibility and typically use the governance committee to spearhead this effort (see sidebar). A continuous cycle of identifying potential candidates, exposing them to the work of the organization and current board members, and getting them actively involved early in the process results in a more well-rounded pool of candidates.

THE IMPORTANT ROLE OF THE GOVERNANCE COMMITTEE

The function and operations of governance committees depend on the organization and its board, but in general, a governance committee is responsible for ensuring the board operates at a high level of effectiveness. Its core job is to find the best possible candidates, introduce them to the benefits of serving on the board, interest them in joining the board,

ESSENTIAL GOVERNANCE PRACTICE #3

Strategic Board Recruitment. The board must be strategic about member recruitment and define an ideal composition for itself based on the organization’s priorities at any given moment. A matrix for board composition facilitates the board’s strategic recruitment efforts. By analyzing the present composition of the board, the governance committee – or the full board if no committee is needed – is able to best determine what qualities, characteristics, and perspectives are already present on the board. When analyzed in light of the organizational strategies, a matrix helps the board identify where gaps exist and then direct recruitment efforts to fill those gaps.

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present a slate of candidates to the full board, and after the final nomination, make sure the new board members are well equipped and positioned to serve the organization in their new leadership capacity.

While some boards have employed a nominating committee to do some of this work, nominating and governance committees differ in their strategic functions. Nominating committees are primarily responsible for recruiting new members to the board while governance committees have the additional responsibility of board performance. However, as boards have come to understand that effective recruitment takes time and that board orientation is important, many boards have turned to governance committees to help undertake this strategic work.

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The Governance Committee's Leadership Role and the Responsibilities of the Board

The governance committee should take the lead in cultivating potential board members, but it is important that the entire board is involved and that everyone understands how best to participate. The board should be aware of the characteristics and qualities needed in potential new board members.

Governance Committee Chair The chair of the governance committee has an important role, as he or she provides a bridge between the committee and the rest of the board. The chair must have a good understanding of the organization and be respected by the rest of the board. In some organizations, the former board chair automatically becomes the governance committee chair. Such an automatic succession system can backfire, however, if the next person in line is not right for the job. Take the time to select a governance committee chair with strong knowledge of good governance practices as well as the energy, enthusiasm, and openness to new ideas needed to effectively steer the committee.

Governance Committee Members Members of the governance committee should be visionary and be able to think strategically about the future needs of board composition, and should represent a microcosm of the board. Specifically, the committee should include people who

- have a broad range of backgrounds
- are active in the community
- provide a wide range of contacts
- understand human dynamics and relationship building
- have experience with organizational development
- are not afraid to speak up
- are respected by the board
- know the organization well and understand the needs of the board
- are willing to bring in new thoughts and perspectives

Board Members Board members can provide valuable insight about the recruitment process, the skills necessary for incoming board members, and any red flags the committee should consider. Board members need to understand what they should or shouldn't do when talking with someone who may be a potential board member. They can certainly share information about the organization's work, determine how much a candidate supports the organization's mission, and even invite candidates to events. However, board members should be careful not to ask candidates if they want to serve on the board or be too transparent about a potential nomination.

THE PROCESS: IDENTIFY, CULTIVATE, RECRUIT AND ENGAGE, DISCUSS

Identify

The search for new board members is a strategic activity; it has long-term implications for the board's effectiveness. The board should consider what it will need among its members to serve the organization during the next few years, not just the immediate future. Referring to a strategic framework can help guide the board in anticipating what skills might be needed from board members as the organization grows.

No matter what particular needs are dictated by the issues facing the organization, each board must look for people with leadership skills, the ability to work as part of a leadership team, and who ask good questions and can follow through on commitments.

Developing a board profile A board recruitment matrix is an essential tool to use when identifying new board members as it serves two functions — assessing the current makeup of the board and assisting in creating a board profile for the board's future composition. Using a sample [recruitment matrix](#), the governance committee should first identify the board's current composition. Consider what is, or is not, working well. Are too many board members concerned with the organization's public image and not enough focused on financial oversight? Is there a diversity of age, gender, and background? Focus on a number of different factors — community connections, resources, areas of expertise, etc. — and not just on one set of qualities. A good board is balanced in more ways than one.

When creating a board matrix, it is important to keep the organization and its specific needs in mind. Don't try to simply check off every box. Instead, create a scale of what is most vital to your board composition. For example, if an organization focuses on youth services, it may prioritize recruiting younger candidates or educators to serve on the board.

Once the governance committee creates a board profile, it should be approved by the entire board.



KEY QUALITIES OF GOOD BOARD MEMBERS

Traditional Ws that every board depends on (plus two more essential Ws):



WORK



WEALTH



WISDOM



+ WIT



+ WITNESS

All boards need members who are willing and able to dive into important tasks, assist in fundraising for the organization, ask the right questions, bring humor to everyday tasks, and talk about the important work of the organization.

Pitfalls to consider when recruiting prospective board members When working to form a diverse board, be careful not to make board candidates feel like poster children for a specific group of people. Even the best intentions can sometimes result in tokenism. Be transparent about your diversity efforts, but focus on the board as a diverse, inclusive mixture and not on the individual representation of each board member. A diverse board mirrors the values and culture of the organization, but may not necessarily exactly reflect the demographic composition of the community the organization serves.

Additionally, do not assume what roles a board candidate might be interested in based on his or her profession. Candidates who work in finance might see board service as an opportunity to use other skills not required in their professional lives and therefore would not be interested in serving as board treasurer. Ask candidates what they are interested in and if there is anything they would like to learn while serving on the board.

Cultivate

In addition to the board members and chief executive, other individuals could have a hand in recruiting and cultivating new board members.

- Senior staff
- Former board members
- Major donors
- Professionals in related fields
- Colleagues and board members of other nonprofits

Once the governance committee, with the help of the full board, chief executive, and senior staff, has identified a pool of qualified board candidates, the cultivation process can begin.

Cultivation involves both 1) creating a pool of individuals who might in the future be asked to stand for election to the board and, 2) developing the kind of relationships with them that will either lead to board membership or some other form of supportive relationship.

One meaningful way to get board prospects involved with the organization is through volunteer opportunities. These opportunities can take many forms, including



serving on a committee



hosting an event



contributing expertise
to a special project



USING LINKEDIN TO FIND BOARD CANDIDATES

In addition to recommendations from board members or individuals connected with the organization, [LinkedIn is a useful tool](#) to identify potential board members. Individuals can indicate whether they are interested in board service on LinkedIn, which allows boards to identify candidates who meet specific search criteria.

Nonprofits can post board openings on LinkedIn as well. The job posting can include information about the specific profiles candidates should have as well as information about the organization.

The cultivation process requires the commitment of the full board to not only identify prospective board members, but also to get to know the candidate and learn more about his or her interest in board service. Individuals involved with the organization's work, but who are not board members, can also be helpful in recommending candidates and building relationships.



Download the **prospective board member information sheet**

Recruit and Engage

Board recruitment should be a personal activity — and a two way street. The prospective board member learns about the organization and expectations of board service while current board members gauge the prospect's fit.



HOW TO APPROACH STRATEGIC RECRUITMENT

Review information about the candidate and set up a meeting or phone call. The meeting should be attended by a representative from the governance committee or a board member who has been matched to a particular candidate.

First meeting

- Mention that the board needs to fill vacancies over the next few years and the candidate has been suggested. Be sure to note that you are exploring interest and availability with a number of candidates.
- Describe the organization including its mission, services, and strategic direction. Invite questions from the candidate to determine how much he or she knows about the organization and how he or she feels about its work.
- Be sure to cover the roles and responsibilities of board members. Determine whether the candidate has any participation constraints.
- If the potential candidate is not already, invite the candidate to participate in a project or task force to help current board members get a feel for the candidate's level of commitment and effectiveness.

Evaluate prospects

- Did the candidate ask insightful questions about the organization and/or the board?
- Does the candidate have any commitments that would preclude effective board service (heavy travel schedule, lack of time invested in project or task force work, etc.)?
- It is important to research candidates' past performance on boards, the extent of their expertise, and their willingness to be a team player.
- Will the candidate be a good culture fit on the board?

The final step in the recruitment process is the formal nomination and election of new board members.

Final Interview

The last step before formally nominating a new board candidate is to have a final talk with the candidate. The board chair, chair of the governance committee, and/or chief executive should meet with the candidate to answer any final questions — both from the prospective and current board members.

This final conversation provides one last chance to assess the needs of the board and ensure that the candidate will be a good fit — not just immediately, but for the future needs of the board and organization as well.

- **Explore the candidates' reasons for wanting to join the board.** Taking the time to understand their motivations and goals for board service will ultimately make the partnership more productive.
- **Provide candidates with more information about why they were selected as prospective board members.** Do they have expertise in a needed area? Good connections? Represent the community served by the organization?
- **Have an open discussion about board fundraising responsibilities.** Ensure that candidates understand that asking for donations is not the only way to get involved in fundraising efforts, but that participation in some way is expected.



Download the **board member rating sheet**

RED FLAGS TO WATCH FOR IN POTENTIAL BOARD CANDIDATES

- Candidates trying to pad a resume or enhance their position in the community without expecting to do much work
- Anyone who brings a personal agenda to the board. For example, a land developer who knows the organization may be moving and has a personal interest in their location.
- Individuals who fail to hear or respect what others contribute. Sometimes, these people present themselves as champions of a cause or assume a moral high ground that can drive other board members away.
- Sometimes, candidates with previous board experience can be difficult to assess. While experience can be a plus, ensure candidates do not assume they understand how things should be done, even without a strong understanding of the organization's history or board culture.

The two most important aspects of strategic board recruitment are intentionality and honesty. Consider the future when recruiting board members and look beyond traditional recruitment pipelines. Additionally, be open with prospective board members — understand what their goals are for board service and be up front about why they are being considered for the position.

With the support and input of the full board, the governance committee should lead recruitment efforts to ensure your organization is being intentional and strategic when selecting new board members. A well-formed board is an invaluable resource in order to strengthen your organization and increase your mission impact.

Sources: [The Board Building Cycle](#), [Governance Committee](#), [The Nonprofit Board Answer Book](#), [Board Recruitment Center](#), [Leading with Intent: A National Index of Nonprofit Board Practices](#)