

A Guide to Successful Board Recruitment



Once a non-profit or voluntary organization is past its founding stage, finding new board members can be a challenge. Here are some ideas to assist your board in being more successful with board recruitment.

It is important to recognize that there are some obstacles to people joining your board, most of which you can easily, if not quickly, address with the suggestions here. The main obstacles to successful recruitment often are:

- People know little about your particular organization or the people involved.
- Many will not be sure what contribution they are able to make, what you believe they add to the board team, and what they can reasonably expect from others involved (board members and staff). Those without board experience may feel intimidated by the mere idea of becoming a board member
- People may have experience on other boards but it may not be not good experience. Perhaps they have attended too many unfocused board meetings or have joined a board only to discover the organization had some internal conflicts.
- Some candidates will not have the time; perhaps they are already heavily committed to another community organization or are at a stage in their life when career and/or family commitments are heavy. Some people may say they do not have the time when one of the other factors is really standing in the way of them saying yes.

A successful board recruitment effort depends on there being a reasonable organizational foundation in place. Your organization's work in the community must be valued and generally understood beyond the present board and staff group. The existing board must also be willing to devote some time, inside and outside of meetings, leading the board recruitment process; it really should not be a staff job. Your board meetings need to be relatively well run and well attended. In other words, it is important that there already is at least a small core of committed board members.

Ten ideas for successful recruitment

1. Invest in making your organization more visible in the community

- Treat your recruitment effort as an opportunity to promote the importance of what your organization does or the difference it makes in people's lives. The benefits of being on your board will include the opportunity it provides for someone to contribute to his/her community.
- Look at invitations to make presentations about your organization as board prospecting

opportunities.

- Ensure that you have some marketing materials, a brochure and a web site that informs and promotes your organization in the community.
- Pay attention to the work of building and maintaining relationships. For example, schedule conversations with your funders and other stakeholders when they do not expect it, not just when you are looking for money or have something specific to report.

2. *Make your board and its job more visible*

- When you talk about your organization include your board in the the picture.
- Use your newsletter to communicate externally what your board is currently working on.
- Put board recruitment advertisements in your newsletter or in other community publications.
- List your board members on your web site, perhaps including your board member job description.
- Involve the chairperson or other board members in meetings that the executive director would otherwise attend alone.
- Produce and distribute to your stakeholders a modest annual report, one that includes a report from the board.
- Pay attention to helping your board be more like a team than a committee. There needs to be more to what the board is about than hearing and approving reports or making decisions.

The East Side
Community Centre is a
nonprofit organization
governed by a
volunteer board of
directors

3. *Be clear about the role of the board, what you expect of board members and what they should expect of the organization*

- Develop a board member's job description which includes a realistic estimate of the time commitment expected of volunteer board members.
- Have a clear job descriptions for the board chair and other officers.
- Create a code of conduct for board members to guide behaviour inside and outside of meetings
- Establish a policy outlining the normal term for board members.
- Indicate an expectation that board members should, with increasing experience, assume more responsibility (e.g., chair, vice chair, secretary) but with time limits attached to these positions. No one is likely to aspire to these important roles if they are likely to be stuck with them indefinitely.
- Communicate what new board members can expect in terms of orientation, mentoring, meeting notices and reports.

4. *Know what you are looking for in new board members*

- Discuss what kinds of additions would make for a stronger and more dynamic board from an external (membership or stakeholder) and internal (board and staff) perspective.
- Pay attention to moving towards greater diversity in age, gender, race, constituencies, backgrounds and experience. You will certainly want people who share the core values of the organization, but not necessarily people who will have the same take on things as the majority. Avoid the tendency to recruit board members just like yourselves.
- Be very careful about recruiting people for their administrative or management skills (an accountant as treasurer, an HR person for the personnel committee) rather than their community knowledge and commitment to your mission.¹

5. *Do not hide your current challenges*

- Tell prospective board members, and those helping you identify candidates, about the challenges the organization faces, financial and otherwise, not just its past accomplishments and strengths.
- Give them some sense of your history, what the organization has been through and what it is going through.
- Speak to them about the strategic issues for the organization and the organization's long and short term objectives.

6. *Look far and wide for board candidates*

- Assume that there are lots of people interested in the work of your organization that are not known to you.
- Look to those parts or elements of the community that are not presently "represented" on the board.
- Prospect for new board members by asking your stakeholders for leads.
- Do not exclude anyone you are interested in from being on the list.
- Recruit with a three year perspective. Approach people you want even if you suspect they are not interested now - they could be interested next year or perhaps the year after that.

7. *Recruit with style*

- Develop a recruitment package containing the mission of organization, a short history and description of what you do, a board member's job description, the list of current board members and the executive summary of your strategic plan.
- Know before you approach them what it is about the person the board wants and your organization needs.
- Try a three-step approach: ask if they would consider serving, if you can give them a recruitment package and then follow-up in a week. If they say no, ask if they would mind if you asked them again next year.
- Contact prospects initially by paying them a visit, making a telephone call, or sending an e-mail
- Invite prospective board members to a board meeting.
- Consider a formal application and interview process to underscore the importance of the decision for both the board and the candidate.

8. *Make recruitment a team building effort*

- Make recruitment part of every board member's job even if you give the detailed work to a committee.
- Set recruitment goals and time lines.
- Celebrate successes.
- Evaluate your approach.

9. *Prepare new board members to participate*

- Give new members a board manual (by-laws, policies, minutes and other resources).
- Have an orientation session to review your governance practices.
- Have an existing board member meet with each new member as a mentor.
- Tour the facilities or offices and meet the staff.

10. *Focus on recruitment regularly*

- Put board recruitment on the agenda throughout the year – at least quarterly.

- Set up a standing board recruitment committee.
- Maintain a board prospects list.
- Keep several copies of your board recruitment package on hand.

Seven easy steps to a successful board recruitment campaign

If you are at the beginning of your recruitment process (and you have not really had one in the past) it may seem like an overwhelming task. If you are a board that meets monthly, here are some first steps:

1. Starting now, put board recruitment on the board's agenda for a 15-20 minute discussion at each of the next **five** board meetings. If your AGM is coming up fast, do not tie your recruitment process to it.
2. At the first meeting discuss **what** you are looking for in new board members. This is probably **the most important recruitment conversation** you can have. Also ask yourselves how many new board members you want to recruit in the next year. (One new board member for every three prospects contacted is reasonable).
3. At the second meeting create a list of potential candidates (those you know of) and a list of the people you need to talk who can suggest candidates. Divide up the latter list of people (not your actual prospects) amongst the board. The members should "fan out" to prospect for candidates. Every board member should agree to make at least one prospecting call before the fourth meeting.
4. Before the third meeting get three board members together to put together a draft recruitment kit including a draft letter of invitation and bring it to the third meeting for board review, editing and approval (with changes).
5. At the fourth meeting put your heads together and outline a recruitment "script". Develop a list of ten candidates, divide up the list and give each member a recruitment kit for the person they agree to approach. E-mail each board member the draft letter of invitation that they can customize to the candidate they are approaching. The approach should be made before the fifth meeting.
6. At the fifth meeting report on results of the month's recruitment effort, evaluate, plan follow-up and, if necessary, continue the process with some additional candidates.
7. Hold on to your list of prospective candidates – note who you have called and when to get back to them. Schedule your next recruitment discussion and set up a standing recruitment or nominations committee.

¹ While recruiting board members with management expertise is a common practice, you may want to give this a second thought. Some of the best board candidates may be people seeking a separation of their work lives and volunteer lives. Recruiting for management skills also can lead to too much board micro-management of matters that should be the responsibility of the senior staff person.

If the organization needs management expertise you should ask if it is the executive director who needs the advice, or the board. If it is the former then it is up to the ED to obtain it. A committee, reporting to the ED, is one mechanism. If it is the board that needs advice, then the question is does it want independent advice or will the advice of an expert on the board do? If you are using board member expertise, be sure that you try to use everyone's advice not just that of "professionals".

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