



# BOARD RECRUITMENT AND ORIENTATION

Tools for Success

# Board Tools for your toolkit

- IDENTIFY
- CULTIVATE
- RECRUIT
- ORIENT
- ENGAGE
- EVALUATE





# YOUR BOARD PROFILE

What do we have? What is missing?

# Your Board Profile

- What demographics do you have in abundance?
  - Age
  - Gender
  - Geography
  - Race/Ethnicity
  - Part or Full Time Residents
- What demographics are you missing or do you need to strengthen? Why are they important?
- What professions/industry/spheres of influence do you have in abundance? What are the important spheres of influence?
- What professions/industry/spheres of influence are you missing or need to strengthen?



# BOARD PROFILE WORKSHEET (TOOL)

Expertise, Skills, Personal Data



# HOW AND WHERE TO FIND BOARD MEMBERS

Meeting those that share our passion for the mission

Where to find suggestions for good board members	Whom to consider for Board membership	Where to look for prospective board members
Colleagues	Current and prospective major donors	Churches, synagogues or other religious institutions
Board members of other non-profits	Community leaders	Trade, professional and fraternal organizations
Articles and reports in the local media	Executives of local and national corporations	Organizations representing various racial and ethnic groups
Chief executive and other senior staff	Owners of small businesses	Local colleges and universities
Board members	Individuals in professions related to the organization's mission	Other ideas?
Volunteer Centers *	People who have benefited from the organization's services	
Other ideas?	Local leadership programs	

## HOW AND WHERE TO FIND BOARD MEMBERS?

"Never believe that a few caring people can't change the world. For, indeed, that's all who ever have."

Margaret Mead (1902-1978); Cultural Anthropologist



# CULTIVATION

Meet, greet, test the waters



# Leadership Development

- Leadership Roles, such as junior leaders
- Assisting with a special project or event
- Serving on an ad hoc committee or standing committee
- Acting as an advisor, expert, or presenter





# BOARD MEMBER EXPECTATION SHEET (TOOL)

Be upfront about what it means to be a member of your Board



# RECRUITMENT (TOOL)

A YEAR-ROUND ACTIVITY!

## *Changing organizational needs affect Board Recruitment:*

- Type of Board
- Level of Decision Making
- Development Stage
- Focus and goals
- Special projects and campaigns
- Senior Staff's abilities
- Image and profile in the community

How does recruitment work in your non-profit?

Nominating Committee

Individual Board members suggest and cultivate Board members

Staff members bring suggestions to the Board



# ORIENTATION

A warm welcome and the information needed to succeed

# How do you welcome new Board members?

- Group session (shared Board/Staff function)
  - Presentation
  - Discussion
  - Tour
- Board handbook or manual
  - Electronic or printed
  - Updated regularly
- Mentors
- Committee assignment and involvement





# WHAT'S IN AN ORIENTATION PACKET (TOOL)

Here's the Go-to Document



# ENGAGEMENT (TOOL)

Committees, Communication and Opportunities to be Together Socially






# EVALUATION

Getting better all the time

# Why is evaluation important?





# EVALUATION (TOOLS)

Input is an important part of the recruitment process.

# Resources

- **BoardSource: Community Resources** ([www.boardsource.org](http://www.boardsource.org))
- **The Board Building Cycle**, Hughes, Lakey & Bobowick, 2003
- **Purposeful Boards-Powerful Fundraising: The Board Self Assessment Process**, Chuck Loring, February 17, 2012 Oak Brook, IL
- **Fostering Board Leadership**, AGB Foundation Leadership Forum, Theresa Popp Braun, Chair, Bowling Green State University, January 27, 2014, Los Angeles, CA
- **Board Development: Recruiting and Developing Effective Board Members for Not-for Profit Organizations**, The Muttart Foundation and the Government of Alberta, 2008



# SHARE YOUR SUCCESSSES

Peer Lessons=Success