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
**How and Where to Find Board Members?**

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

“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!
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

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
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)

- 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

SHARE YOUR SUCCESSES

Peer Lessons = Success