

Developing a Board Recruitment Process

About This Guide

This article has been developed by **Wild Apricot** in response to requests from the participants in our [Small Membership Insight Survey](#) for strategies on board recruitment.

This article is intended for the volunteers and staff of small membership organizations that are new to board recruitment or looking to refresh an existing process. We're not board experts, but we've gathered some advice and tips from others in the field that are - in order to develop an overview of a basic 4-step board recruitment process to get you started.

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"Did top-performing nonprofits excel because they had a great, dynamic board, or did their strong performance attract a strong board? The answer is both."

(The Dynamic Board: Lessons from High-Performing Nonprofits - McKinsey & Company)

Why develop a board recruitment process?

While the task of recruiting board members might seem a little daunting, it's important to take the time to find candidates with the right values, skills, attitude and commitment. After all, even though this is a volunteer job, being a board member is a crucial leadership role! These folks are going to be responsible for the financial and cultural well-being of your organization. They are defending and promoting your mission; acting as key spokespersons and possibly driving fund raising too. For small volunteer-led organizations, the board may be managing the day-to-day operations as well.

In going through a structured application and review process, you can take the time to really get to know the potential board members and lay the foundation for building a strong relationship. This is critical, since this new recruit will become a very active member of your immediate board family or team, which will be working together to lead the organization for one or two years.

It's not about "filling seats". An established recruitment process (that includes a well-defined role and expectations as well as an application and screening process) ensures that all candidates are qualified and evaluated using consistent criteria and process. So it won't come down to a question of a referral gone wrong, an awkward situation or even worse, the desire to "uninvite" a candidate who turns out to be a bad fit or poses any potential conflicts of interest.

Finally, this not a one-time exercise – you are building a long-term relationship. Although you might be thinking about filling a one-person gap right now, there will always be turnover of the board. So it's important to have a process in place rather than a stop-gap measure. While you'll want to revisit the specific criteria on a regular basis to ensure they suit your current needs, having a recruitment process in place takes the pressure off. And if your process includes maintaining on-going applications and leads, you may be able to jump right to the screening process when a board

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position comes available!

So whether you are a staff person coordinating the recruitment process, a board member helping out in “filling the gap” on your board, or a member of the nominating or board development committee, it’s important to follow a recruitment process to ensure you identify, assess and choose the right candidate for this very important job.

Membership Application Checklist for Associations

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4-step board recruitment process

After reviewing articles, guides and posts from a range of experts, we’ve compiled a 4-step board recruitment process to get you started.

Who should manage the recruitment process?

What we haven’t included in these four steps is an overview of who should manage the board recruitment process. In some small or newly established organizations, board members or committee members recommend or refer individuals for consideration by their board team or an executive committee. Other organizations create nominating or board development committees that manage the entire process. These committees are usually appointed by the board and include board members as well as other members of the organization to offer “a mix of perspectives.” The nominating committee is often chaired by a past board chair and may be a year-round standing committee, or struck when there are board vacancies.

Of course, the structure or membership of your board selection team or committee should be customized to suit your organization’s needs and may even be stipulated by your bylaws. The key is to have a group of individuals committed to taking the time to establish and follow a structured process.

Step 1: Define your needs

As Anne Wallestad, interim chief executive of

[Board Source](#) suggests, “effective board service starts with the right match – the right match between an individual with the talent and commitment to make a difference and an organization that is in need of that individual’s unique blend of skills and attributes.” But how can you know a candidate is a good match unless you’ve identified what you are looking for?

To ensure an effective, highly functioning board, you need to define the role and expectations for board members. This means defining the job, understanding the skills required to be successful in that job, and identifying the values and qualities that will enable the new recruit to become part of a cohesive board team. It’s also important to establish specific expectations for individuals and the board as a whole in order to set goals and evaluate performance.

Do you have a job description?

Just like the hiring process for a paid job, when you are recruiting board members, you start with a job description that outlines: the position’s key duties and responsibilities; the necessary requirements to fulfill those; and details on what the commitment entails. Here’s an outline of the type of information to include in your job or role description. You can use this as a guideline to draft a job description that meets your organization’s specific needs.

Benefits:

- What benefits are involved with being a board member for your organization? (e.g., making a difference (how?); satisfaction in working with an energetic, committed board team, attending special events, etc.)

Responsibility and Authority:

- To whom is the board member accountable?
- What authority does each board member have?

- What are the general responsibilities board members are expected to take on?

Term:

- How long are board members expected to serve?
- What are the conditions under which a board member can resign before the term is ended?
- What are the conditions under which a board member may be removed from the position? (this may be stipulated in your bylaws – so check wording)

General Duties:

- What are the typical duties expected of a board member? (e.g., attends regular (monthly?) board meetings; reviews monthly financial statements; participates in fundraising; participates in/manages committees; etc.)
- Are board members expected to manage or mentor the organization's staff?

Time commitment:

- Approximately what is the time commitment expected of board members? (e.g., number of hours for reviewing materials; attending board meetings; attending committee meetings, annual meeting, other tasks?)

Legal / Financial commitments:

- What are the legal implications of taking on this role? (e.g., liability; accountability?)
- What are the expectations in terms of bylaw development, monitoring, etc.?
- Are there financial expectations? (e.g., are board members expected to raise funds, provide sponsorships, etc?)
- What is the board member's role in the organization's finances? (e.g., is the board responsible for budget management? Is the board responsible for the organization's financial health?)

Qualifications / Skills Requirements:

- What general skills are needed? (e.g., inter-personal, problem-solving and communications skills, etc.)
- What are some of the other skills or expertise you may be looking for? (e.g., board governance, policy development, financial expertise, strategic planning, marketing skills, event management experience, etc.)

Are there specific skills or attributes you need right now?

Along with the specific job responsibilities, you need to think about the type of skills sets you need on the board – which skills are missing that are required to round out the board's framework? It can be helpful to have a diverse board composition – with members from different backgrounds and with different skills-sets that complement one another, like players on a sports team.

In her Forbes article, [Building Successful Non-profit Boards](#), Elmira Bayrasli suggests *“that there is real value to having different skills... individuals asked to join a non-profit board should bring added value to the institution – and its staff. Because the majority of non-profits bootstrap their operations, taking care to “minimize overhead,” they often make do with a small staff that is expected to juggle several responsibilities, none of which few are experts in.”*

For example:

- Do you need a “change agent to help the board navigate”?
- Are you looking for someone with financial skills; fundraising, marketing or special events experience; human resources expertise?

Some organizations use a [“board composition matrix”](#) *“as a worksheet for detailing the skills, characteristics, and talents of your board members, and identifying gaps.”* But, as [Peter Brinkerhoff](#) reminds us, *“the skillset your board needs is a moving target.”*

...Some skills may be relatively timeless, but many change with the times. If you are planning a major building project, do you have bankers, architects and realtors on the board? If you are doing community outreach, what about community leaders, ministers, elected officials?” His advice is to

“develop a short and long term skillset list and drop it into your ongoing recruitment efforts.

What qualities do new recruits need to bring to the boardroom table?

While skills are definitely important, when it comes to guiding your non-profit's or association's mission, looking at the fit for values and qualities is also essential. In her post, [Recruiting for Board Members - Process? What Process?](#) Hildy Gottlieb offers some suggests of *“qualities that will help the board function better, do its job better.”*

Some examples may be:

- *Understanding of our community and its needs*
- *Passion for our cause*
- *Willingness to commit time for board meetings, committee meetings, planning sessions, special events*
- *Team player - works well in a group*
- *Someone who listens well, is thoughtful in considering issues*

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Step 2: Find candidates

The best case scenario is to develop leads (e.g., through a nominating or board development committee) and maintain a list of potential candidates throughout the year. If your organization has a process in place to keep track of individuals who offer to volunteer throughout the year, you can simply pull that information and begin screening those candidates.

However, if there is no pre-existing list or database of volunteers, you might want to develop a process for gathering and storing this information from here on in. This could involve creating a specific Board Application Form (see the section below), or a more general volunteer application form, online database or at the very least, a spreadsheet. *(If you are a [Wild Apricot](#) Membership Management Software client, you can capture this information a number of ways, such as creating a Volunteer Database and/or creating groups on Volunteer/[Membership Application](#) forms to enable data management and customized emails.)*

While you may be lucky enough to have folks offering their service, in many cases, there is a perception that you need to be asked or invited to serve. So if you don't have any leads or list of board candidates, here are some ideas for finding new recruits.

Getting the word out:

The first step is letting folks know that you have an opening on your board. As we noted in our [Getting Started with Volunteer Recruitment](#) guide, there are a number of ways to get the message out, including:

- **Referrals and word-of-mouth:**

The first place to start is with the standard request for referrals from existing board members and volunteers. Ask your existing team to look for candidates from among:

- Friends
- Family
- Colleagues and associates
- Neighbors
- Community members (at church; clubs; sporting teams, etc.)

- **Publicize within your network:**

To identify candidates from a wider network, consider:

- Writing a newsletter article or a post on your organization's blog or forum
- Posting a request on your Facebook page
- Posting a compelling video or photos of last year's event on your FB page and ask for new recruits (follow-up with anyone that "Likes" your post)

- **External promotion:**

You might need to widen your search to include:

- Putting an ad in your community newspaper
- Posting a request through your municipal or state/province volunteer center

- **Using online resources to find candidates:**

You can consider finding candidates using some online matching or volunteer programs such as:

- www.boardmatch.org
- [BoardSource Recruitment Center](#)
- [boardnetUSA](#) – A free resource to help nonprofit organizations find board members, and board candidates to find service opportunities.
- [Bridgespan](#) – a fee-based resource to post board positions, with free searching for board candidates.
- [LinkedIn Board Connect](#)
- www.idealists.org

Step 3: Screening and selection

Application form:

The application form (which can also be an online form) will help you gather and collect information about each applicant. Carter McNamara (Free Management Library) suggests that your application form include information such as: “*biographical information, why they want to join this board, what they hope to bring to the board, what they would like to get from their board membership and any questions they might have*”. He also offers a [Sample Board Application Form](#) that your nomination committee can use as a guide in developing your own custom form.

Although board members may refer or recruit colleagues or friends, it’s important that all candidates or prospects go through the full application and screening process to ensure consistency and to avoid any conflicts of interest or potential issues down the road.

Screening/interview process:

Once you’ve reviewed the applications, you need to develop a process for screening potential candidates so you can develop a short-list for interviews. As Hildy Gottlieb suggests, “*think of this application process as you would if you were hiring an employee. You want to get to know the applicant just as they want to get to know you, all to determine if there is a fit.*”

Screening is an important step in this process and part of your due diligence work. As [Volunteer Canada’s Screening Handbook](#) (PDF) suggests:

Screening practices play a critical role for organizations in fulfilling their moral, legal, and ethical responsibilities to all those they reach, including members, clients, participants, employees, and volunteers. ... The benefits of screening are threefold:

- *To better match people’s skills and experience to the needs and opportunities in organizations;*
- *To improve the quality and safety of programs and services in communities;*
- *To reduce the risks and liability for both people and organizations.*

Interview tips:

Holding an interview with all potential candidates offers an opportunity to discuss the role and find out about the candidate’s: background, skills, interests, qualifications, personal goals. And, generally, to see if he or she is a good fit for the role, the board team, and the organization as a whole.

In preparing for the interview consider:

- Developing a standard set of questions (these should include questions around: skills to meet

job description; values and attitude; time commitment; potential conflicts of interest based on career or other volunteer activities; discussion of any legal and financial commitments, etc.)

- Start the interview with an overview of the selection process
- Provide an overview of the organization and its mission/objectives
- Go over the board role description (even if they've received it beforehand)
- Create a form to document responses consistently across all applicants

Short-list:

Some organizations develop a short-list of candidates through the screening and interview process and actually invite them to attend a board meeting. Since the selection process may have only involved a few of the board members, this meeting offers an opportunity for the board to meet and interact with the candidates. It also lets the individuals see first-hand what a board meeting is all about.

Selection:

The final step in the screening process is for the nominating committee to choose the finalist from among the short-listed candidates. Again, the final selection should be made based on a set of criteria in terms of a skills-set fit, as well as a discussion of the candidate's ability to fit with the board and the organization in terms of values, attitude and personality. *Some organizations also require that screening of board candidates involves a police record check.*

Once the choice has been made, each of the candidates needs to be notified (preferably through a personal call from the chair of the nominating committee) to officially invite them to join the board, or else to thank them and let them know if their services aren't required. If, however, any of the other short-listed candidates were considered a good fit, consider letting them know you'd like to call on them if there are any future openings on your board.

Along with the call, the new board member should receive a letter confirming his/her invitation to join the board and outlining the role, timelines, commitment and all pertinent details.

Step 4: Provide an orientation for new board members

Congratulations – you've selected a new board member. But the process isn't quite done yet – you need to orient the new member so they are ready to take on their new role. The orientation format can be done through providing a welcome package of information, an orientation video, a presentation or a training session – depending on your organization and its specific resources and needs. However, at a minimum, new board recruits should receive the following information:

- An overview of the organization – its mission, vision, values
- Organization chart – outlining structure (e.g., board, committees, staff roles & responsibilities, etc.)
- Organization's annual report and any other pertinent financial reports
- Role description (and any additional documentation or forms that need to be completed)
- The organization's strategic plan
- Most recent board meeting minutes
- The organization's most recent newsletter and/or brochure
- Schedule of board meetings (and locations), annual meetings and any other events he/she is required to attend
- Contact information – board chair, members, staff contacts etc.

In conclusion:

Board recruitment doesn't have to be a challenging and urgent task to "fill a gap". While you may have one seat open right now, there will always be turnover of the board, so it's important to have a process in place rather than a stop-gap measure. While you'll want to revisit the specific criteria on a regular basis to ensure they suit your current needs, having a recruitment process in place takes the pressure off. *We hope this article helps you in getting started with or refreshing your board recruitment process.*



Sources for this article:

Here are the posts, articles and guides we've used to develop this article:

- [Board Development – A Self-Guided Workbook](#) (PDF) – Wendy MacDonald (Muttart Foundation and Alberta Culture and Community Spirit)
- [Board Recruitment: Getting the People You Want](#) – Peter Brinckerhoff (Corporate Alternatives, Inc.)
- [Building a new not-for-profit organization: Board development](#) – Paulette Vinette (Charity Village)
- [Building Successful Non-profit Boards](#) – Elmira Bayrasli (Forbes)
- [Filling the gap: Recruiting new directors for your board](#) – Michelle Halsey (Charity Village)
- [Guidelines for recruiting new board members](#) – Carter McNamara, MBA, PhD (File Management Library)
- [Lessons from High-Performing Nonprofits: The Dynamic Board Report](#) (PDF) – (McKinsey & Company)
- [Musing on the Matrix](#) – Linda Crompton (Exceptional Boards)
- [Recruit Board Members](#) – BoardSource
- [Recruiting for Board Members - Process What Process?](#) – Hildy Gottlieb (Creating the Future)

Additional Resources:

- [A Matter of Design – Matching Volunteers Using Job Description](#) – (Volunteer Canada)
- [Primer for directors of not-for-profit corporations](#) – (Rights, Duties and Practices)
- [Today's "Board Orientation" Just Isn't What It Used to Be](#) – Patricia A. Hudson (Melos Institute)



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