



The Development Resource Center

Teaching the Fundamentals of Effective Fundraising

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Forging the Board of Your Dreams, Part II: Board Recruitment and New Trustee Orientation

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Nonprofit boards often struggle to find new members. And they rarely have a documented process in place to tell them how. Let's eavesdrop on a typical conversation between Liz, a current trustee, and Malik, a potential board member...

Liz: Hi Malik. Thanks for meeting me for coffee.

Malik: Sure Liz, no problem. What did you want to see me about?

Liz: Mal, you know that I'm on the board of the Simons County Food Bank, and when my colleagues and I were talking about other people in the community we felt would make great board members, your name came up. Hold on! Before you say anything let me tell you what it's all about.

It's not that big a time commitment. You wouldn't have to do any fundraising. It would be okay if you weren't able to come to all of the meetings. We just think that you're a very committed, smart person who cares about hunger in our area, and we'd like you to be at the table to offer your thoughts and counsel. Could you do that for me? Please??

Malik: Well... I'm kind of surprised, and a little flattered. But, umm... sure!

Sound familiar? You know what's coming next, right? Malik shows up at his first board meeting, and he suddenly finds himself expected to do one or more of the following: oversee a budget printed mostly in red, help get a grip on the problem-child Executive Director, jump on the fire brigade to save the group from its latest death spiral, and—you guessed it—raise some cash fast! I mean, the rent's due on Tuesday, right?

What happens then? Malik becomes Mister Cranky Guy! Let's rewind a bit; what was the job description that Liz provided?

Board Member Responsibilities (per Liz)

- 1) The board does not require a large time commitment.
- 2) No fundraising work is required.

- 3) Regular meeting attendance is not required.
- 4) It's helpful if members care about the mission.
- 5) Your primary role is to be present to offer thoughts and counsel.

Based on the list he was given Malik is absolutely right to be cranky! Liz, in fact, misrepresented the role (probably out of a desire to get a "yes"). If the board had no written job description for its members then Liz also had no official, documented resources to help her. That is, unfortunately, very common. Malik will certainly be annoyed. He may even walk.

This process and its cousins have two endearing qualities: they're a set-up for failure, and they piss people off. So don't go there! Let's look at an alternative recruitment strategy.

The board should create and approve a job description for its members. Part One of this series of articles is an excellent resource for such a description. The board should also create a Committee on Trustees and draft a charter for them that includes their responsibilities. Among them are new board member recruitment and orientation.

New Board Member Recruitment

The committee should design and recommend a written recruitment process for new trustees to the whole board. The board then finalizes the process and votes to approve it. Here is the counsel that we offer our students on this.

Boards function best when they have somewhere between thirteen and nineteen members. Fewer than that and the rate of burnout rises. More than that and the board's group process tends to become unwieldy. Avoid situations in which the entire board comes up for re-election at the same time. 100% board turnover will create an artificial (and avoidable) earthquake for your group's stability. Have your trustees serve two or three year terms and stagger their terms of service so that only half or a third of the board members are up for re-election each year.

The board should determine how many open slots there will be in the next election cycle, what sorts of people and/or skills are most needed, and *what the deadline for the receipt of applications will be*. That's right. The Committee on Trustees advertises the fact that you are looking for new board members and invites people to send in an application and cover letter expressing their interest. The marketing material should include the board job description, your mission statement, an indication of what kinds of new members are especially encouraged to apply, a link to your website, and the deadline. The board can also approach individuals in whom it is especially interested and personally invite them to apply. This is not a guarantee of acceptance, but it is good marketing.

The Committee on Trustees reviews the applications that come in by the deadline, decides which candidates to interview in person, and, based on the interviews and application materials, makes written recommendations to the whole board on candidates that should be considered for the open slot(s). If your board is elected by your group's membership or another body then these recommendations are passed on to them. If your board is self-perpetuating then it decides what candidates to offer positions to, if any.

Candidates who are offered positions receive written notification of that fact and are asked to provide an answer within a day or days. Candidates who are not offered a position, including those who applied and were not interviewed, are informed in writing that their interest is much appreciated but that the board could not offer them a position at this time.

Stop for a moment and imagine the experience and expectations of a new board member sitting down for her first meeting who went through the second process as opposed to the one that Malik passed through. How would they be different? Exactly.

Orientation for New Board Members

Guess what? We're not done. New board members need orientation resources so that they will come up to speed quickly. Two things, at least, should take place. First, each new trustee must receive a board manual that contains the following information: the board member job description, the mission statement, a brief history of the group, the most recent annual report, the current fiscal year's budget, the group's bylaws and articles of incorporation, a schedule of the board meetings planned for the year, sample minutes of the last few board meetings, a sample board agenda, an outline of your board meeting procedures, a list of board committees and what they do, a contact list including all other board members and the E.D., and anything else that you deem useful.

Second, all new board members should be assigned a "buddy" from among the veteran trustees. The new person and the buddy should sit down at the new member's first meeting and schedule one private get-together (via phone or in person) per month for the next three months. They may also talk at other times, but having these meetings scheduled will make sure that there is time to talk, deal with questions, and help the new trustee to settle in.

Using this process or one like it will ensure that your board's new recruits arrive well-informed and motivated, and that they receive the information that they need to become active and constructive members of one of the most important parts of your organization.

Next month's column: The Life Cycles of Nonprofit Boards

Buzz Harris is the Executive Director of the Development Resource Center (www.developmentresource.org), whose mission is to teach the fundamentals of successful fundraising and governance to nonprofits and NGOs. The DRC offers inexpensive, web-based distance-learning and in-person courses on fundraising and board service, including "Building a Strong Board of Directors" (next one: May 23), "Building a Donor Base" (begins May 6, four sessions) and "Grant Seeking" (April 4). Buzz can be reached at <http://www.developmentresource.org/contact>

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