

# Recruitment

## BOARD LEADERSHIP

Wondering how to get new, better, richer, younger people on the board? Well, the first thing to consider might be how you ended up with tired, low-net worth, ineffectual or under-performing board members in the first place. Did they start as new, young and committed board members who over time grew into passive hangers on that the organization never bothered to replace? Maybe these board members are still good people, but the issues and needs facing the board have changed, requiring a new set of skills and capabilities. Understanding why a particular board of directors cannot or does not meet the organization's needs is key to identifying and recruiting members who can and will meet the immediate and future challenges.

### Symptoms and Key Questions

- We don't have the right people on the board.
- How do we get high net worth people on the board?
- How do we get younger people on the board?
- We don't have anyone to replace board members who are rotating off.
- How can we diversify the board?

## Root Causes

### Nonprofits Lack the Board Members they Need

Fundamentally, there are two reasons that boards lack the members they want. In some cases, the board is not conducive, or prepared, to effectively receive and utilize new members. In other cases, the difficulty comes from a historical culture and/or structure that perpetuates an outmoded governing model and makes attracting new board members a challenge.

#### 1. The current board does not function effectively:

- a. **There are no mechanisms for getting members off the board when they are not actively engaged.** Or, even if there are such mechanisms, fellow volunteers are reluctant to ask their peers to leave the board when either their terms are up or they stop attending meetings. This leaves little room for new people to come on to the board. It also serves to maintain and perpetuate the status quo, allowing non-performing members to stay the board, if only in name, at a level that is most comfortable for them.
- b. **The existing board is disorganized, ineffective or in conflict.** When potential or new board members come to their first meeting, only to find that the meeting which was scheduled to conclude by 8:00pm is still going at 10:00pm, or that members are talking over or past each other, or there are any number of other indicators that board leadership and organization is ineffective, the new person is likely to resign in a hurry, leaving the same group going through the same motions over and over. Similarly, current board members are reluctant to bring new people into a board culture that is not functional.

#### 2. The board does not have an effective recruitment process:

- a. **Board recruitment is infrequent and uninspired.** Many boards come to the end of the year and realize that it is time to nominate new members for the board. Typically what happens next is that the chair of the nominating committee steps up at a board meeting and tells the board that new board members are needed, and asks the board to send in nominations. Then what happens is...nothing. The chair of the nominating committee then gets more insistent, and one or two names come forward, who may or may not be appropriate for the board.

- b. The board leaves the job of board recruitment to the nominating committee.** There are two problems with this approach. The first is that the organization loses the breadth of relationships that the full board brings to the organization when they rely solely on the nominating committee to identify potential board candidates. Secondly, this charge can potentially backfire in one of two directions: 1) the committee fails because it does not have the right personnel to find appropriate new board members, or 2) they are staffed with like-minded members who only recruit candidates with similar personalities and interests.
- c. Board recruitment is left to the executive director OR the executive director insists that board recruitment is solely the job of the board.** Essentially, these issues are two sides of the same coin – people in leadership positions are saying “it’s not my job” to bring new board members into the organization. Despite all the books that say otherwise, in practice, the job of recruiting new board members often does fall on the executive director. As a key representative of the organization, the executive director meets many people who may be able to contribute at the board level. S/he needs a mechanism for steering those candidates into a board-led nominating process. However, if the executive director drives the nomination process, the organization runs the risk of having a board that will not challenge, properly oversee or evaluate the paid leadership and, as a result, will fail in one of its primary governance responsibilities.
- d. Potential board members are turned off by a long list of organizational woes.** Board candidates are often presented with a laundry list of organizational needs or difficult (or unpleasant) issues, and are told what role they need to play in resolving those issues. Little thought given to why the candidate would want to do something about those needs, and often only cursory attention is given to the candidate’s thoughts on other interests in the organization. Just as most people do not respond well to fundraising appeals that emphasize “desperation,” so too do potential board candidates avoid organizations where the first thing they are asked to do is to clean up a mess.

### 3. The current board isn't ready to welcome new members:

- a. The board culture doesn't support board members from new groups and new people feel excluded.** Symptoms of an uninviting board culture can range from the fairly innocuous (i.e. the tendency of members “in the know” to use an endless stream of acronyms that new members would have no way of understanding) to the more serious, as in excluding a member from key discussions and or decision making processes. Often the exclusion may be a long-standing part of the board culture, and members may be genuinely unaware of the barriers they are creating for new members. This is often the case when fairly homogeneous boards start to reach out to other constituencies without understanding how to bridge cultural or communication differences.
- b. People don't have peers on the board.** For better or for worse, many people like to be with their peers, or with people they wish to emulate. And even the most dedicated, confident people need a certain comfort level to enter a new group. So, for example, if an organization is looking to add one or more new members with greater net worth, it helps to have members with similar financial capacity already on the board. That being said, there is always a “first” when diversifying a board, and finding that those initial candidates (two or more prospects is better than one) takes hard work and a dollop of good luck.
- c. Meetings are not accessible or are inconvenient.** For example, meetings are held in locations with limited parking or poor access to mass transit, or business people are asked to meet during peak work hours, or a parent is expected to attend meetings in the afternoon when children are out of school and require child care. Boards need to understand and be sensitive to the needs of different constituencies.

#### 4. Recruiting new board members is hard!

It isn't easy to find people who are passionate about your mission, and who are willing to give of their time and resources as governing members of the organization.. First of all, there are more nonprofits today than there were twenty years ago. This is compounded by changes in the role of volunteers, which include, among other issues:

- a. **A changing view of civic engagement**, which is no longer a “given” venue for expression of one’s social responsibility.
- b. **More women are in the workplace and more people are working past retirement**, reducing the number of available “professional” volunteers.
- c. **People who do volunteer have multiple demands** and are often interested in shorter or limited volunteer assignments.
- d. **And then there is a greater level of public mistrust**, in general, towards charities and corporations, which has lead potential board members to fear increased liability or exposure associated with board service.

All of the above combine to make the challenge of recruiting new board members increasingly difficult.

## What You Can Do: Attracting and Retaining Productive Board Members

Fortunately, there are many things that you can do to improve your chances of successfully recruiting appropriate board members to support your mission.

### 1. Improve the way your board works together.

**a. Make explicit agreements** about the roles and responsibilities of the board in the next phase of the organization's development. Expectations are usually stated in the following areas:

- 1) Attendance at board meetings.
- 2) Participation on committees or task forces.
- 3) Familiarity with mission and programs.
- 4) Making a gift and participation in general fundraising.

**b. Work to create an effective board culture.**

**c. Ensure that board meetings are effective**, focused on governance tasks, and reflect the organization's mission and culture.

### 2. Implement an effective recruiting process.

**a. Develop a board profile.** Analyze the skills, perspectives and relationships needed to support the work of the board and the organization. Compare the required attributes to the characteristics of current board members, then identify gaps between the two and develop very specific attributes for which you are recruiting new members.

**b. Identify other essential considerations for board membership.** Expertise, relationships and financial capacity are not the only qualifications for board membership. Other, less tangible, considerations, including a strong interest in the mission, potential fit with the defined organizational culture, and willingness to participate actively, are equally important to the effective leadership of the board.

- 1) **The most important element in board membership is a passion for the mission.** The key to success for many of the exemplary boards we studied was the willingness of trustees to take a leadership role, even in times of crisis. What motivated these board members was their belief that the work of their organizations needed to be continued for the sake of the community. Their commitment to the mission went beyond their loyalty to any one individual.

- c. Have a formal, year-round recruiting process** that is clearly defined, with agreement in advance on how the process is handled, including:
- 1) Who decides which candidates to approach.**
  - 2) Who can initiate a discussion** with a potential candidate to test his or her interest in board involvement
  - 3) Establish a well-planned process to interview prospective board members.**
  - 4) Have a defined role for the executive director** in the recruitment process. Since the executive director works closely with individual board members s/he and the candidate need to meet before a final decision is reached.
  - 5) Have a defined role for the board chair.** As with the executive director, s/he will need to meet with the candidate before a final decision is made.
  - 6) Determine what materials should be given to prospective board members.**
  - 7) Decide what information potential board members will be asked to give the organization.**
- d. Make sure that all board members understand the priorities for board recruitment.** There are several advantages to making sure that members understand exactly who the board is looking for. It focuses their thinking about who they already know, while at the same time allowing them to recognize a potential candidate they might meet.
- e. Members should talk to everyone they know about the organization (although not necessarily the board.)** Board members should be doing this anyway, but especially as a way of testing out potential support for funding as well as board participation. If an organization knows who they are looking for, chances are members will find themselves in a conversation with someone who is a good fit, or with someone who can be a link to another potential candidate the agency is hoping to recruit.
- f. Make sure that all board members know the protocols for approaching potential members.** Otherwise members are going to find themselves in an embarrassing situation, where a candidate thinks they have been asked onto the board, when in fact they are just being given a preliminary interview.
- g. Be able to articulate what makes board service rewarding at a given agency.** Common motivations for board participation include commitment to mission, an opportunity to make a real difference, the chance to meet interesting or influential people, and the ability to meet an individual's personal or professional goals. It is important to be articulate and enthusiastic about an organization's strengths.

**h. Tell prospects what you want them to do.** Many times boards are afraid of laying out explicit expectations to potential board members in case they “scare them off.” Since “how do we get rid of deadwood” is the second most frequently asked question about nonprofit boards, an organization should let people know what is expected of them right from the start. Also, as an example, while it may be obvious to the agency that they want the new high-net worth board member to make a leadership gift (and help bring on other members who can give at a higher levels), unless clearly stated in the recruitment process, the expectation may not be at all obvious to the new board member. Organizations need to inform candidates up front as to what is expected of them, so the prospect can make a decision about whether or not this is a role they want to play.

**i. Be prepared to discuss opportunities for involvement other than board service.** Not every potential candidate can or should join the board. If there is not an immediate fit, it is possible that the person might join a committee to see if his or her interests and ways of working are compatible with the organization’s culture and priorities. Serving on a committee is also a good way for someone to get to know at least one aspect of the organization well before considering board membership.

**1) Having other ways to engage leadership volunteers** can help if the candidate is not ready to join the board. It also helps cultivate the relationship with a potential board member. A prospective board member may want to hold off in order to complete board assignments with other organizations before s/he can give full attention to a new board. The organization may still get the benefit of their wisdom and relationships without their having to take on governance responsibilities.

### 3. Introducing diversity into the board room.

Diversity encompasses many variables. In many, it prompts the notion of gender, ethnic, racial, religious and/or sexual orientation. Increasing diversity on a board, however, may translate to bringing in people from different fields or professions, or with different skills and expertise, as well as different ages, life experience and level(s) of education. All of this extends the notion of diversity.

**a. When people interviewed for this project talked about diversity,** they commonly meant one or more of the following:

- 1) How aging boards could find younger professionals who will become the future leaders.
- 2) How grassroots boards could find high net worth people who will make substantial gifts, as well as bring on their friends and peers with “deep pockets.”
- 3) How a board comprised primarily of white professionals could identify and recruit professionals of color to serve on the board.

- b. There are three key elements** that contribute to successfully making a board more diverse:
- 1) Developing a clear understanding of the specific reasons for increasing the diversity of the board, and how the skills and talents of the board members brought in will be meaningfully utilized and engaged.
  - 2) Finding qualified board members outside of their natural peer group. This is most challenging when considering how hard it is for many organizations to find qualified board members of any background.
  - 3) Creating a welcoming environment that will allow people from different backgrounds to participate fully.
- c. Recruiting people of different backgrounds.** The following are suggestions for ways a board can pursue diversification by reaching out to specialized constituencies.
- 1) Recruiting young people:** Ways to reach out to young professionals include:
- i) Network or place notices at alumni associations of local colleges and universities.
  - ii) Place notices in corporate bulletins. Many corporations now have explicit programs designed to encourage and support their employees in board service.
  - iii) Set up a MySpace page to promote your organization and volunteer leadership opportunities.
  - iv) Host small events to introduce the organization to the peers of the young people already involved in the organization.
  - v) Reach out to people who have been served by the organization's programs or activities.
- d. Recruiting people with the capacity to give at higher levels and mobilize substantial financial support for the organization.**
- 1) Brainstorm and create lists of family members, friends, colleagues and associates of current members. Boards will be surprised at the number of connections that are one phone call away.
  - 2) Challenge the board to consider gradually increasing giving levels. Shifting the culture of the board takes time and is often best accomplished by incremental steps. [NOTE: These discussions are best done through one-on-one conversations with the chair and each member.]
  - 3) Work to get programs and special events covered in the media that are used by people you are trying to attract – including trade and professional publications, local print publications, as well as broadcast and electronic media.

**e. Recruiting professionals who bring ethnic, culture and racial diversity.**

The first question to ask is why the board is looking to recruit people based on cultural differences, particularly racial or ethnic criteria. It is certainly true that funders look for racial diversity; it is suggested, however, that racial or ethnic considerations alone are not necessarily meaningful in a board development context. For example, two people with similar socio-economic and educational backgrounds will not necessarily present different perspectives simply because they have different racial and ethnic backgrounds.

1) Consider the following questions for discussion on diversifying the board:

i) Are you looking for individuals who are more reflective of the people served by the organization? A classic example of this is where a historically philanthropic, benevolent board governs an organization that focuses on an underserved population. Seeking new, more locally-oriented board members will bring more informed, experienced voices to the work of guiding agency policy, and serve to more effectively represent the people served.

ii) Are you seeking fresh perspectives as a way to enrich the board's deliberations? Some boards become too homogeneous and that can hinder both their effectiveness as well as their potential to grow and strengthen the organization.

iii) Will you hold all board members to the same set of outreach and financial expectations?

iv) What does the board need to do to successfully welcome people from different backgrounds, particularly when they are joining a board that is overly uniform in membership or has long established working and social relationships? The board need to understand its existing culture – and be open to change – in order to accommodate different perspectives and ways of working.

**With all of this said, some additional sources of candidates include:**

- churches
- employee affinity groups
- associations (e.g. the National Association of Black Journalists, etc.)
- service organizations (e.g. Rotary, etc.)

## Bringing on New Members

### 1. How do organizations orient and engage new board members?

**a. Make sure that there is an effective board orientation process in place.**

If the organization is recruiting people new to board service – particularly if they are new to the nonprofit sector – it is important to give candidates an orientation to governance, to nonprofit structures and processes, and to the guidelines for effective meetings. In addition to an on-site tour of the facility and programs, board members typically receive materials such as:

- 1) Bylaws
- 2) Budget and audits
- 3) Annual report
- 4) Organizational history
- 5) Strategic plan
- 6) Media kit

**b. Have an assignment or clearly defined role ready for each new board member.** Such an assignment may mean joining a standing committee or task force, or taking personal responsibility for an individual task that feeds back to a board committee or to the full board.

### 2. Provide support for new board members.

**a. Recruit people in multiples.** Pairs are ideal, especially when adding people who bring diversity, new experience or professional networks or backgrounds to the current board. For example, when moving from a grassroots board to more of a governance board, invite two people who have training and experience with active governing boards who can support each other in helping the current board move to the next phase.

**b. Some boards assign a member** who has been on the board awhile to mentor the new member. This can be a very good role for outgoing board members who have been particularly strong or effective leaders.

## Roles in Moving Forward

### 1. If you are the board chair:

- a. Introduce the chair of the nominating/board development committee** to the most current literature on recruiting board members.
- b. Work with the governance committee** and/or the full board to clearly define the expectations for the current and new members.
- c. Set an example** by following the recruitment process that has been recommended by the nominating/board development committee and approved by the full board.
- d. Talk to potential board members** about the level of commitment they can make to the organization, and the kind of board culture they hope to find.
- e. Reach out to new members** to help them feel welcome and included.

### 2. If you are the chair of the nominating or board development committee:

- a. Introduce the most current literature on effective board recruitment** to your committee and the board chair.
- b. Develop a board profile** and outline the skills and attributes you want to target in the recruitment process.
- c. Guide the full board** in a focused discussion of board recruitment.
- d. Develop a board recruitment** process to bring to the full board to refine, document and formally adopt so everyone can be “on the same page” about the process.
- e. Develop an orientation program** to introduce new board members to the organization, and to smoothly and efficiently integrate them into the work of the board.
- f. Make the cultivation and recruitment** of board members a year round effort for all board members.
- g. Periodically check in with new board members** to see how they are doing, offer support and guidance, and help them get comfortable on the board.

### 3. If you are a current board member:

- a. **Make sure you are familiar** with the agreed upon process before talking to a board prospect. If there is no set protocol, ask the board chair or the chair of the nominating/board development committee to consider developing one.
- b. **Talk to others about your service on the board**, why the experience is satisfying, and why the organization is important. Your thoughts and observations may inspire friends, colleagues and even casual acquaintances to become active supporters.
- c. **Ask the executive director and board chair** for information you need to be able to talk to potential board members about the organization.
- d. **Ask at a board meeting** about where the organization stands with regard to board development goals, particularly if the matter has not been discussed for awhile.

### 4. If you're the executive director:

- a. **Share current literature related to board recruitment** with the board chair and chair of the nominating/board development committee.
- b. **Pass along information about people you meet** who may make good board members to the chair of the nominating/board development committee.
- c. **Be available to meet potential board candidates** and to introduce them to the day to day work and the longer term impact of the organization.
- d. **If you are part of the recruiting process**, bring along a board member who will learn with and from you about how to talk about the organization and what questions to ask of a potential board member.

## Signs of Progress

As described in the following example of Good Shepherd Services, it can take years to shift from one kind of board model or structure to another.

### 1. Signs that you're making progress will include:

- a. **Board members are feeding names** into the nominating/board development committee on an ongoing basis.
- b. **Some of the gaps in the board profile are being filled.**
- c. **You have identified a member who is a catalyst** for new kinds of board members to join.
- d. **New board members are enjoying** board service and feel that their skills are being used productively.
- e. **You have more candidates** for the board than you can comfortably accept at one time.

## How Outside Expertise Might Help

There are some organizations, such as the local United Way or Junior League, that can be a source of new board members. BoardNet USA is an online resource for matching nonprofits and potential board members. Professional associations (the local Bar Association, etc) can also be a source of potential board members. Umbrella membership organizations, such as Association of Professional Fundraisers (AFP), sometimes offer their members training in finding and engaging new board members.

Some nonprofits are drawing on the expertise of professional recruiters or “head hunters” to help them think about new ways of finding and approaching potential board members.

While nonprofits often want consultants to bring them new board members, few can or will do so. Consultants can, however, help board development/governance committees develop a board profile, create a recruitment plan, shape interview questions, and design an effective orientation process.

An external facilitator can be especially helpful to a board that is grappling with issues of organizational culture and barriers to inclusion of new members or alternative points of view. In that role s/he can provide valuable information and insight to the board about how their way of operating is seen from an outside perspective, and what changes might help the board become more effective and inclusive.

## Lessons from Exemplary Board Leadership

### Building a Board from Scratch

Good Shepherd Services was founded by the Sisters of the Good Shepherd in 1857, and was formally incorporated as a nonprofit organization in 1947. In the early 1980's, the religious decided to shift to a lay board. To focus her efforts to build the board, the Executive Director, Sr. Paulette LoMonaco, went to a United Way training on board development. She combined what she learned from the training with her experience of serving on other boards of directors.

Building the board often starts with one person with contacts. In the case of Good Shepherd, that person was Joe McLaughlin, a partner in a law firm, who was one of the first of the professionals she brought on when she was recreating the board. One of Joe's law partners introduced him to Sr. Paulette. Good Shepherd appealed to Joe because of his own background and interests, and because he thought it was an opportunity for him to make a real contribution. Joe became the new board chair and he and Sr. Paulette formed a very close working relationship.

Joe saw an important part of his role as chair being to bring in "free labor" to supplement agency resources. The board chair and executive director knew that it was not enough to bring on people of good will. Part of the motivation for building a new board was to help the agency become financially self-sufficient. Because Good Shepherd depends on reimbursements from government contracts to fund their residential care programs, they often experienced cash flow problems, which they had been addressing by borrowing from the Sisters of the Good Shepherd. Therefore, the agency wanted to recruit individuals who would make Good Shepherd their top funding priority. Every board member was expected to make a financial gift.

The board started by making a wish list of all the types of people they would love to have as members. In addition to the capacity to make a sizable contribution, their considerations included:

- representation from all of the sectors that make up the New York economy,
- skills and expertise that the agency did not have internally,
- life experience, and
- fit with the three W's: Work, Wealth and Wisdom. To this list they added "Wit," meaning how the person would fit with the organization's culture.

Joe then introduced some of his clients to Sr. Paulette and Good Shepherd, and the executive director met others on her own. "I brought on friends and people I knew well, some of whom Sr. Paulette knew as well. She and I talked daily – Who would be right? Would he or she be good? What would it take to get a particular project done?"

People agreed to join the board for a number of reasons. First of all, they believed in the program, which Joe thought was the best in the city. According to Joe, Good Shepherd “showcased what they did well, and could demonstrate outcomes.” Sr. Paulette’s reputation, and the reputation of Good Shepherd as a well managed organization, were both attractive qualities to potential board members. Sr. Paulette added that people were drawn to Good Shepherd because they saw an opportunity to make a real contribution. They also knew and trusted Joe.

It took Joe and Sr. Paulette almost seven years to rebuild the board. Sometimes Sr. Paulette would invite people onto the board, in other cases Joe would. Once they had a good core of board members, they began to look further for new industries. The board developed some stability and continued to grow and evolve. Since they were looking for people from different sectors, each of the candidates they recruited drew were from different professional and social circles. This greatly contributed to the breath of skills, perspectives and overall capacity of the board.

## Resources

**Board Source** (2007). “The Board’s Role in Developing a Diverse Leadership Team,” Trustee.

**Lakey, Berit M. Ph.D.**, (2007). *The Board Building Cycle: Nine Steps to Finding, Recruiting, and Engaging Nonprofit Board Members*. Washington, D.C.: BoardSource.

**Brinckerhoff, Peter C.**, (2007). *Generations: The Challenge of a Lifetime for Your Board*. Fieldstone Alliance.

### **The following organizations may be able to match nonprofits with board resources:**

**United Way of New York City, Linkages Board Training and Placement**, [www.unitedwaynyc.org/?id=36](http://www.unitedwaynyc.org/?id=36) – According to the United Way website, “Linkages is designed to promote and sustain effective nonprofit board governance by recruiting, training and placing business professionals as board members. The program provides business professionals a meaningful and productive way to share their professional expertise with nonprofits in need of enriching their board’s makeup.”

**BoardAssist, Cynthia Remec** – 212.605.0165, [www.boardassist.org](http://www.boardassist.org)  
BoardAssist describes themselves as a New York based nonprofit whose mission is to identify and recruit high impact board members for the nonprofit community on a pro bono basis.

**BoardNet USA**, [www.boardnetusa.org](http://www.boardnetusa.org), managed by Volunteer Consulting Group. BoardNet USA is a website designed to help nonprofit boards and potential board members find each other.