Guide to Board Recruitment & Onboarding
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Recruiting

Guide & Prompts
1. Who Are We?

Skills

Constituents Served

Source: BoardSource
2. Who Is Missing?

Demographics

<table>
<thead>
<tr>
<th>BOARD MATRIX WORKSHEET</th>
<th>Current Members</th>
<th>Prospective Members</th>
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<td>Other</td>
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Source: BoardSource
3. Where Do We Find Them?

- Existing Networks
- Beyond Your Immediate Circles
- Partner with Local/Regional/National Organizations
4. How Do We Get To Know Them?

Led by the Nominating Committee Chair and supported by the Board Chair and Executive Director:

• Research expanded candidate pool
• Garner warm introductions
• Initiate those conversations by first hearing from candidate and then sharing
  • Passions
  • Motivations
  • Commitments
• Assess capacity and inclination to give
5. How Do We Decide Who To Invite

- Review Skills Grid for Gaps
- Understand Fit & Stretch
- Consider Timing
6. How Long Should It Take?

• Fast Enough
  • Prioritize responsiveness and genuine engagement
  • Don’t string candidates along

• Not Too Fast
  • Take time to get to know candidates relative to the skills grid and as individuals
  • Allow candidates time to get to know the organization and expectations for the role
7. How Do We Extend the Invitation?

- Make It Personal – Nominating committee chair should extend the invitation to join the board by phone.

- Make It Official – A formal letter signed by the Nominating Committee Chair and Board Chair should immediately follow the telephone invitation.
8. How Do We Get Started with a New Board Member?

- Intentional Onboarding
  - Design a process
  - Compile and share essential information
  - Engage in conversations leading up to first board meeting

- Mentors/Buddies
  - Create a mentor/buddy system
  - Match new board members to existing board members with shared interests
  - Encourage continuous communication
1. What’s the First Communication?

**Who**

**What**

**When**

- **Warm Welcome**
  - Call or letter from Board Chair & Nominating Committee Chair
  - Announcement to full board

- **High-level overview of organization in written form**

- **Invitation to upcoming programming**
2. What’s is Our Onboarding Goal?

Start

Orient

Engage

Focus on a smooth start for new board member(s)

Complete a thorough orientation while allowing time for full digestion

The question cycle

Answer initial questions
Foster more questions
Deepen understanding
2. What is Our Onboarding Goal?

Start  
Orient  
Engage

• Focus on a smooth start for new board member(s)
• Complete a thorough orientation while allowing time for full digestion of information
• The question cycle
  • Answer initial questions
  • Foster more questions
  • Deepen understanding
3. Who Needs to Be Involved?

- Nominating Committee Chair
- Board Chair
- Executive Director
- Board Buddy/Mentor
4. How Long Should It Take?

- 12 months of onboarding
- Quarterly engagement ahead of each board meeting
  - Q1: Orientation
  - Q2: Deep dive into organization’s work
  - Incorporate mid-year debrief
  - Q3: Foster active engagement
  - Q4: Wrap & Review
5. How Do We Smooth The Path?

Board

Candidate

- Put their skills to use early
- Provide stretch opportunities
- Consciously include them in the life of the board and work of the organization

Board Candidate

- Call on members to think back to their first days on the board
- Prepare the group for new energy
- Encourage to engage new members personally
6. Which Committee Assignments & When?

Finance

- **Highest Use**
  - Serves as a useful first assignment in order to allow for a full view of organization
  - Emphasizes the mantra, “no margin, no mission”

- **Highest Need**
  - Remember why you recruited the candidate(s) and assign to committees that leverage those skills

- **Highest Need**
  - Maintain focus on where there is need
  - Be conscious of the opportunity to stretch new board members in interesting ways
7. How Do Make Sure the Match Sticks?

- Communicate frequently
- Leave space for new ideas
- Assign meaningful work
- Make connections personal
8. What Keeps Everyone Engaged?

• Maintain focus on the organization’s mission
• Harness the contributions and talent of all
• Call on members to contribute candidate recommendations continuously
• Talk about the “culture” of the board
• Work hard to maintain that “culture”