



# Guide to Board Recruitment & Onboarding

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# Recruiting

Guide & Prompts

# 1. Who Are We?

Skills

Constituents Served

**BOARD MATRIX WORKSHEET** (Continued from previous page)

	Current Members						Prospective Members					
	1	2	3	4	5	6	A	B	C	D	E	F
<b>Resources</b>												
Money to give												
Access to money												
Access to other resources (foundations, corporate support)												
Availability for active participation (solicitation visits, grant writing)												
<b>Community Connections</b>												
Religious organizations												
Corporate												
Education												
Media												
Political												
Philanthropy												
Small business												
Social services												
Other												
<b>Qualities</b>												
Leadership skills/Motivator												
Willingness to work/Availability												
Personal connection with the organization's mission												
<b>Personal Style</b>												
Consensus builder												
Good communicator												
Strategist												
Visionary												
Bridge builder												

Source: BoardSource

## 2. Who Is Missing? Demographics



### TOOL 9

#### EXPERTISE/SKILLS/PERSONAL DATA

This worksheet can be adapted by organizations to assess their current board composition and plan for the future. The governance committee can develop an appropriate grid for the organization and then present its recommendations to the full board.

In considering board building, an organization is legally obligated to follow its bylaws, which may include specific criteria on board size, structure, and composition. Or the bylaws may need to be updated to incorporate and acknowledge changes in the environment and community that made board structure changes necessary or desirable.

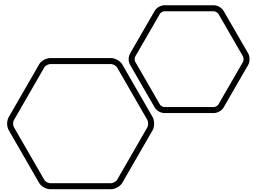
Remember, an organization will look for different skills and strengths from its board members depending on its stage of development and other circumstances.

#### BOARD MATRIX WORKSHEET

	Current Members						Prospective Members					
	1	2	3	4	5	6	A	B	C	D	E	F
<b>Age</b>												
Under 18												
19 – 34												
35 – 50												
51 – 65												
Over 65												
<b>Gender</b>												
Male												
Female												
<b>Race/Ethnicity</b>												
African American/Black												
Asian/Pacific Islander												
Caucasian												
Hispanic/Latino												
Native American/Indian												
Other												

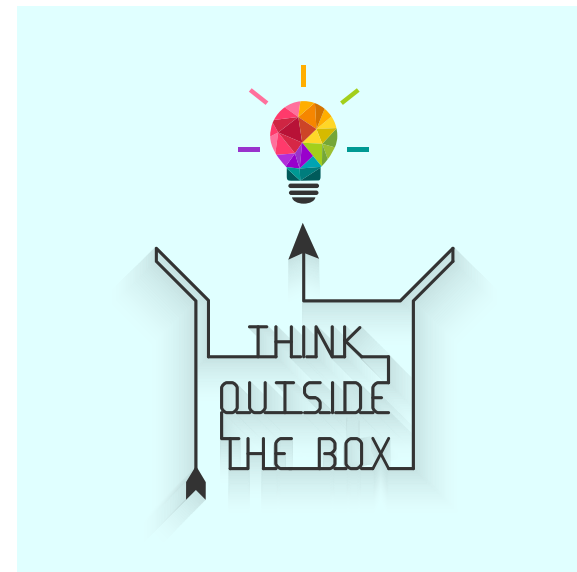
(continued on next page)

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



# Onboarding

Guide & Prompts

# 1. What's the First Communication?

Who

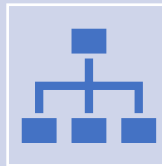
What

When



## Warm Welcome

Call or letter from Board  
Chair & Nominating  
Committee Chair  
Announcement to full  
board



## High-level overview of organization in written form



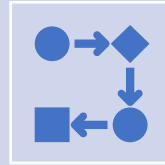
## Invitation to upcoming programming

## 2. What's is Our Onboarding Goal?

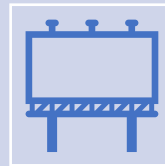
Start

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?

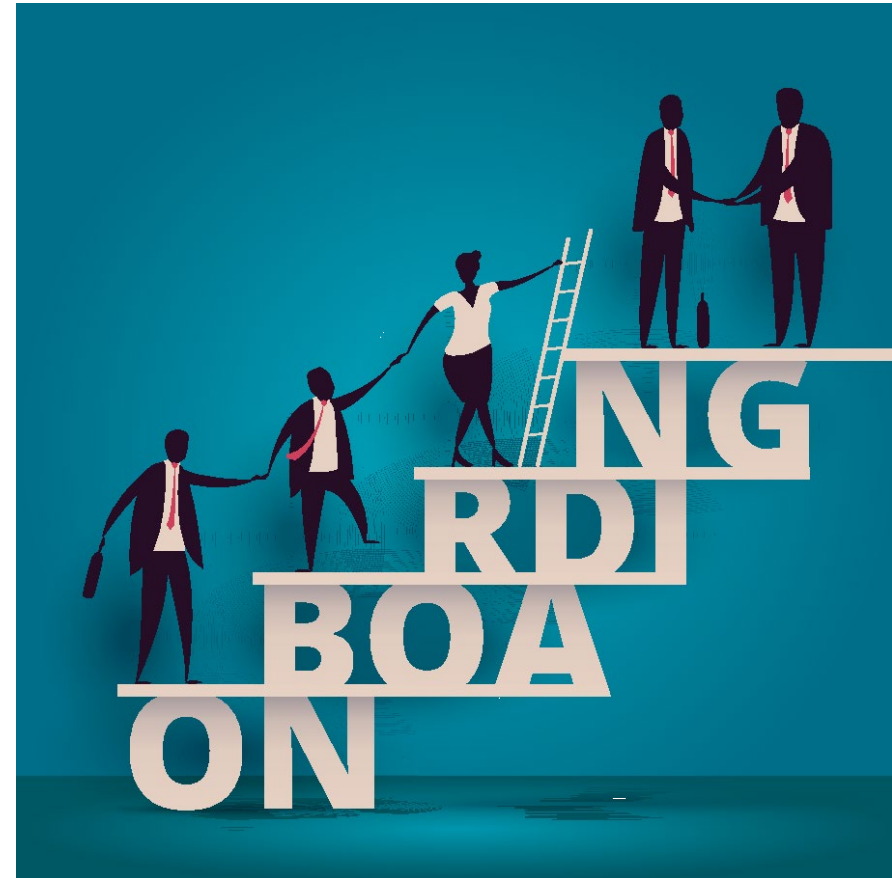
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- Nominating Committee Chair
- Board Chair
- Executive Director
- Board Buddy/Mentor



## 4. How Long Should It Take?

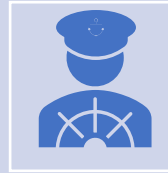
- 12 months of onboarding
- Quarterly engagement ahead of each board meeting
  - Q1: Orientation
  - Q2: Deep dive into organization's work
  - Incorporate mid-year debrief
  - Q3 Foster active engagement
  - Q4: Wrap & Review



## 5. How Do We Smooth The Path?

Board

Candidate



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

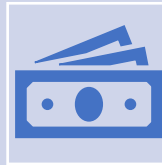
Call on members to think back to their first days on the board  
Prepare the group for new energy  
Encourage to engage new members personally

## 6. Which Committee Assignments & When?

Finance

Highest Use

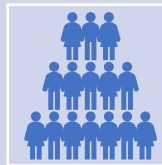
Highest Need



Finance

Serves as a useful first assignment in order to allow for a full view of organization

Emphasizes the mantra, “no margin, no mission”



Highest Use

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



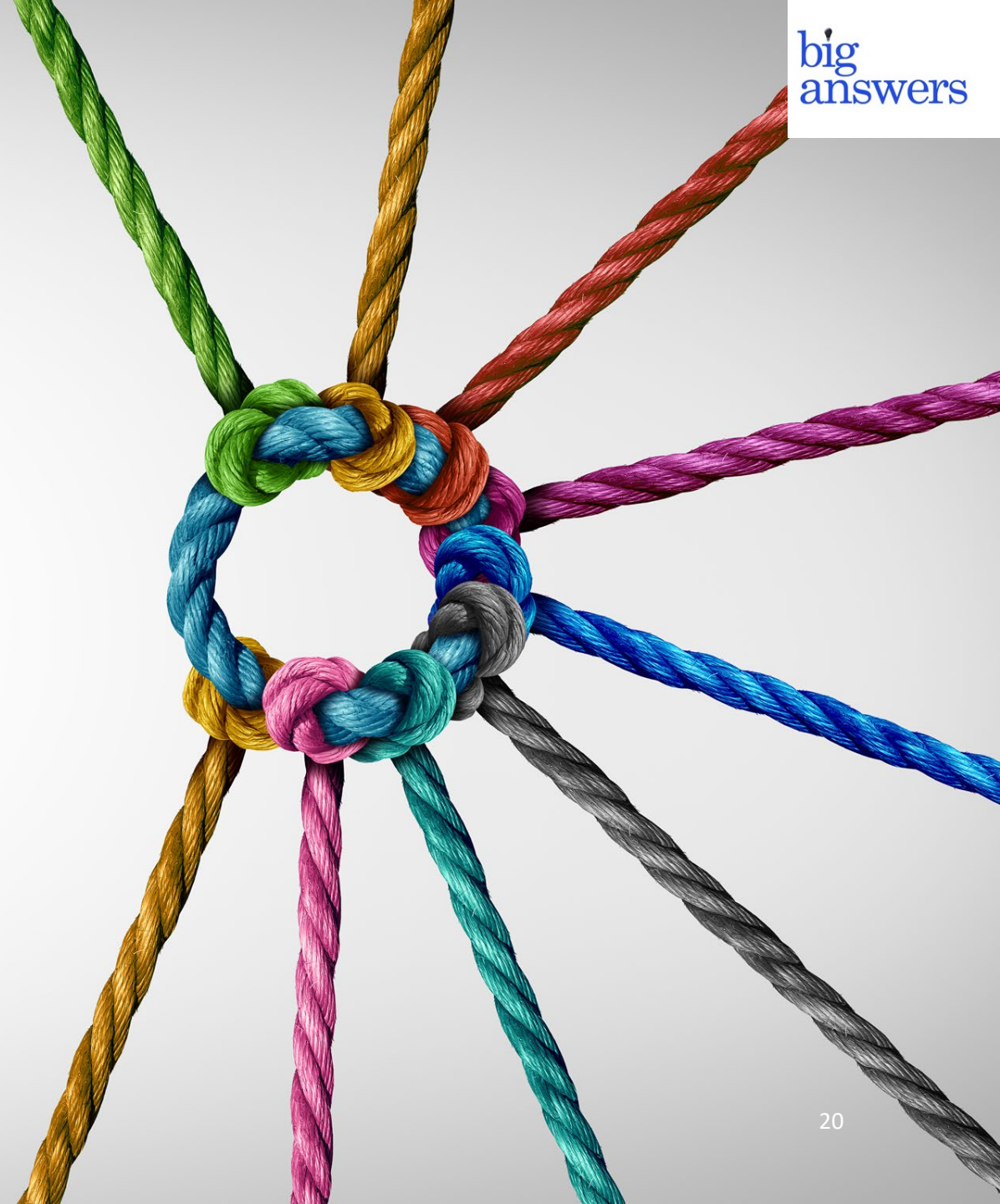
Highest Need

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"

