

# Board Recruitment Resources

*Reading Length: 10 –15 minutes*

## Developing Leadership Pipeline

### Define qualifications and responsibilities for Board positions

The board should establish the qualifications candidates must have to become directors.

Create a job description for board positions to provide structure and goals for various officer roles and for director positions. These should be separate from committee appointments roles, which would have different job descriptions.

### Establish the Board's needs

The board should determine what skills or experience are needed on the board to ensure the section's success. These can include:

1. Volunteer
2. Financial
3. Operations
4. Publicity
5. Community organizing
6. Legal
7. Philanthropy
8. Capacity to give or get (or both) a minimum amount.
9. Strategic thinking
10. Leadership
11. Communication
12. Diversity

### Recruit to fill gaps in your board's areas of competence.

Each member brings different skills, experience and interests to the board. Look at what skills and interests are already there and identify those still needed.

Ask what current board members are interested in. Don't make assumptions about who has time and who has skills without really asking what your current board members actually think they can or should do.

Ask people to stretch themselves in terms of skills and try on some new jobs (with support, of course). You may find this is a great way to build a wealth of skills in a larger number of people.

## Be Proactive in Recruiting Diversity

Diversity enhances the board's effectiveness, staves off stagnation, makes it easier to recruit new board members, gives access to new spheres of influence and people, and adds credibility because the board reflects NCJW's stated mission and values. There are many forms of diversity in addition to skills and experience including age, physical ability, race, sexual orientation, and gender identity. Here is a resource to aid you in actively recruiting and including diverse members: <https://www.councilofnonprofits.org/thought-leadership/10-steps-more-diverse-board>

Remember! An important and primary focus is to identify and cultivate a diverse group of people who will take responsibility to ensure the strategic and financial success of section.

## Identify Candidates Who Might Be Good Directors

Two sources of new directors:

- Section members
- Members of the community at large

Every board member should be thinking about finding their successor and building the board. Think expansively about your circles of contacts.

- Section members
- Friends
- Friends of friends
- Colleagues
- Women at your kids' school
- Synagogue members
- Neighbors
- College classmates, etc.

Get creative. Look for unusual suspects.

If you have already identified some potential new leaders – ask them for suggestions. Even if they turn down the invitation, they still may be able to suggest others who would be terrific.

Who will be interested?

- Lots of people! They just don't know it yet. And you don't know unless you ask.
- People become interested when you explain NCJW to them and share your passion.

# Recruiting and Retaining Good Board Members\*

An effective board should include active members of the community the organization serves and accurately reflect the diversity of that community. A nonprofit with a well-organized board recruitment process, as well as clear position descriptions and job duties, will not only make new member selection go more smoothly, but will attract appropriate candidates. Nonprofits can take several steps to recruit good board members, including:

- Establishing clear bylaws that include comprehensive information about the board of directors' election process.
- Creating board member job descriptions, including meeting requirements and additional time commitments.
- Clarifying duties to ensure potential board members understand their legal and fiduciary duties.
- Developing officer positions designed to meet the needs of specific organizations; example: Minnesota law requires that a nonprofit fill the offices of president and treasurer.
- Establishing a board governance or nominating committee to analyze the needs of the board, such as professional skills, community connections, representation, and oversee the election process.

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\* Source: Minnesota Council of Nonprofits. [info@minnesotanonprofits.org](mailto:info@minnesotanonprofits.org)

# Personal Characteristics to Consider When Selecting Board Members\*

Identifying, recruiting and choosing the right board member for a nonprofit can be a difficult task. It takes careful planning and thoughtful input from the board and can even involve other stakeholders. The following is a list of character traits provided by Berit Lakey's [\*Board Building Cycle\*](#) that can be helpful when recruiting and selecting board members.

- Establishing a board governance or nominating committee to analyze the needs of the board, such as professional skills, community connections, representation, and oversee the election process.
- Ability to listen, analyze, think creatively and work one-on-one with people and in a group setting.
- Willing to learn more about the nonprofit, prepare for and attend board and committee meetings, ask questions, take responsibility and follow through on assignments, contribute generous personal and financial resources depending on circumstances, open doors in the community and evaluate oneself as a board member.
- Open to developing skills, such as cultivating and soliciting funds, recruiting additional board members and other volunteers and reading financial statements.
- Possess honesty, sensitivity to and tolerance of differing views, a friendly, responsive and patient approach, community-building skills, a sense of values and a sense of humor, personal integrity and concern for the nonprofit's development.

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# Retaining Good Board Members\*

Once an organization has effective members on its board of directors, it is essential to retain them. Nonprofits can ensure effective board members continue their vested interest in the organization by doing the following:

- Prepare new board members with an orientation by existing board members (and any staff involved). New board members should be given collateral materials about the organization's current and recent activities, as well as any information that will be useful in their position.
- Thank and recognize board members to sustain job satisfaction for volunteer board members.
- Lead by example through good attendance and active participation in board meetings. This can be an effective way to deal with inactive board members.
- Conduct exit interviews for board members who leave mid-term or after his or her term has ended to learn more about their board experience.
- Maintain relationships between nonprofit staff and board members, as both work together to govern and manage the organization.

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# Approaching Prospective Board Members

1. Be prepared.
2. Research (Google) your contact so you can make your pitch meaningful to her.
3. Tailor your pitch. What part of the NCJW experience will appeal to this candidate: mission? A particular project? Leadership opportunities? Warm community? Being part of a national organization? Networking possibilities? Status of board membership? Figure it out and tailor your presentation accordingly. (You can get some of this information during conversations with the candidate.)
4. Be able to state succinctly:
  - a. Mission
  - b. Size of the organization measured in dollars and number of members
  - c. Core work
  - d. Section's relevant accomplishments, history, etc. (Stories and vignettes are effective)
  - e. Future goals for the organization
  - f. Overall requirements of board members. This is a great time to use a board member job description. Be honest about what is involved and clear about expectations.
5. Identify why the board wants this specific person on the board. And why the board experience would benefit her. Be ready to make it personal.
  - a. How does the candidate's background, experience, existing ties/ network, etc. relate to NCJW? Why *this* organization?
  - b. How can the candidate make a valuable, unique contribution to the organization?
  - c. What kind of experience will she have as a board member?
  - d. What involvement possibilities are available to her as a board member? Great opportunity to discuss potential committee assignments, community outreach opportunities, chairwoman roles, strategic development of the section, etc.

# Implement the Solicitation

- Personal contact is key.
- Contact candidate to state purpose and set up a meeting. Phone call is best but email or letter might be necessary.
- Initial meeting in comfortable spot, e.g., over coffee or lunch.
- Follow-up meetings to meet other board members or staff or to visit programs.
- This is a cultivation process, which usually progresses over a long period of time. Let the process unfold, don't rush them into leadership positions.
- This is also a great opportunity to find out what interests this candidate, which has to further inform your pitch. This information will also help you to develop a plan for mentorship and growth that is a cornerstone to engaging and retaining her as a board member as you move forward.

# Talking to Potential Board Candidates

## “Why me?”

**You have expertise.** Explain how it relates to organization. Refer to **her background** gleaned during chit chat and prior research. For example she:

- Comes from family who value Jewish works or philanthropy or service, it's deeply rooted in her experience.
- Has a passion and commitment to women, philanthropy and service – what NCJW is about,
- Has existing ties to the organization.
- Has professional expertise or powerful networks or relationships that will be tremendously valuable to the organization.
- Has entrepreneurial experience, tremendous business mind, etc. that are applicable: this is a business in turnaround mode.

## “Why do this?”

- If you want something **meaningful** in your life, this board can bring you meaning.
- The organization is at a pivotal point.
- It's an incredibly important time in the life of this organization.
- It has an amazing legacy.
- Women on the board are incredibly devoted, been on board 30+ years.
- Have wisdom to know it's time to get new people involved.
- It's a **tremendous opportunity** to take an organization with a great mission and amazing history to a new level.

## “Why this organization?”

- You will have a **bigger role** than elsewhere and have **critical impact**.
- You will be a magnet for other people and a centerpiece for this board. You will be major factor in the life of this organization.
- You will look back after your term and feel you did something heroic, feel proud, be a model for [your children], you'll have that the rest of your life. You will have changed the world.

## This organization is unique

- 125-year history of innovating new programs at the forefront of every major social movement
- We are possibly the only organization of our kind that pairs service and advocacy.
- Inspired by Jewish Values
- Women are the doers and leaders



# Transforming Your Board Members into Brand Ambassadors\*

*"Many of our board members often cannot clearly and concisely articulate who we are or what we do. How can we turn them into better Brand Ambassadors for our organization?"*

I get this question a lot in my branding workshops, and my answer is always the same: The best place to start is in the board recruitment process.

People agree to serve on boards for all kinds of reasons, many because they truly believe in the mission and work of the organization. Others, however, go on boards because they feel honored to be asked and don't want to disappoint the person doing the asking; others because of the prestige of being a board member; still others because they like to see their names on the organization's letterhead.

Even those who join boards for all the right reasons still need to know what is expected of them once they agree to become board members.

Here are some things to consider when seeking people to serve on your board:

1. **Select well.** How often have you heard the mantra "We need people of affluence and influence on our board?" Affluence and influence are fine. But if these characteristics are not backed by wisdom, integrity, and commitment, they don't amount to much. Therefore, select people to serve on your board who truly believe in who you are, what you do, how you do it, and care enough about your organization to go into the community and actively persuade others to support your good work.
2. **Articulate your expectations.** Don't assume that board members, especially new board members, understand your expectations. Before bringing them on board, let them know that, among other things, you expect them to serve as good Brand Ambassadors for your organization, and what that means. Part of what that means is that they need to know what to say about your organization (see #3).
3. **Create a "messaging package."** Everyone affiliated with your organization needs to "stay on message" when it comes to explaining to others what your organization is all about. Therefore, create a "messaging package" that, among other things, includes a

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positioning statement, sometimes referred to as an "elevator speech," as well as supporting statements that clearly articulate your organization's key brand messages. And make sure that everyone in your organization knows what those messages are, especially board members!

4. **Encourage board members to go into the community to deliver your brand messages.** Once they understand and can articulate your brand messages, encourage board members to speak in front of local civic organizations like the Chamber of Commerce, Lions and Kiwanis Clubs, church groups, etc. and to tell their colleagues and families about your organization and the important work it performs in your community. These are all effective—and cost-free—branding opportunities that many organizations overlook.
5. **Get your board members to work as a coordinated team.** Board members need each other's support and need to know each other as colleagues who share a common mission. If they exchange ideas both at regularly scheduled board meetings, in committees, and informally between meetings, they are much more likely to promote the organization's brand and support its fundraising activities.

*Larry Checco is president of Checco Communications and author of Branding for Success: A Roadmap for Raising the Visibility and Value of Your Nonprofit Organization. In more than 25 years of nonprofit communications experience, he has helped raise the brand visibility, fundraising capabilities, membership levels, and impact of some of the nation's most respected nonprofit organizations and government agencies. For more information, go to [www.Checcocomm.net](http://www.Checcocomm.net).*