

# Your Board's Recruitment Package

By E. Grant MacDonald



So, you have determined that your non-profit organization needs some new board members. The board has discussed what characteristics it is looking for to replace those individuals whose terms are over.<sup>1</sup> Perhaps your board might even expand its numbers a little. You may even have a beginning list of people to approach that you have developed over the last couple of years.

What are the first steps? An invitation? Perhaps a meeting over coffee with each candidate? Are there some materials you might leave with them, or send to them, to help them decide? Here are some tips on steps including what to include in your non-profit board's recruitment package.

A decision to join a board is an important one. You want a candidate to be well informed about your organization and be able to give their commitment considerable thought before they agree to serve. You also want them to know that your board has taken some care in determining the organization's current board needs.

Remember that effective board recruitment is part of the continuous effort to communicate with people who have a strong interest in what you do. Recruit with at least a three-year horizon. Even if someone does not say yes this year, they might be interested in the future.

Also, if you are thinking about joining a board, either because you have been approached or are searching for involvement in the community at a board level, this guide can also serve as an outline of information you might seek from a non-profit.

## **Personal invitation**

There is no substitute for a personalized approach. An invitation, by e-mail or by letter, and perhaps a phone call, should be the starting point of each recruitment conversation. At the outset do not overwhelm a prospect by making your full case. You want to spark their curiosity, entice them to take a closer look at your organization.

*A good first step is indeed an invitation to meet over coffee.* If they seem like they might be a good fit and they want to know more, then follow-up with your recruitment package. Ask them

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<sup>1</sup> The main director characteristics that your board will want to discuss include: skills, level of commitment, reputation, contribution to board diversity, and governance experience. The makeup of a board will differ with changing organizational goals and environmental circumstances.

for a written expression of interest and resume. Larger steps might involve being a guest at a board meeting, or a tour of the organization.

Above all be frank with every board candidate. Why are you interested in them? What are the organization's and board's current challenges? What strengths are present? Do they have a genuine interest in this level of volunteer engagement? Don't understate the commitment you are asking for. And, be sure to follow-up with every candidate with a thank you regardless of whether they say yes.

An existing board member ideally should start the initial recruitment conversation. If one of your leading (i.e. hoped for) prospects is to be approached, the executive director and the board chair might be part of the initial interaction. Make time for each candidate. Avoid the "I'll see Erin at a meeting next week and will mention our interest to her" approach.

If this all seems like a lot to do, it is. Remember this process ought to be a continuous one, not something to start two months before your AGM.

### **A Useful Decision Package**

You may want to avoid referring a board candidate to the information on your organization's website. An envelope or file folder of a few materials is much better. It will be visible presence on the person's desk as they consider your invitation. What should you include?

- Your organization's vision, mission, and values can help get prospective candidates excited. If you have a long version, not just the 'elevator pitch' kind, consider enclosing it. Perhaps you have brochure that does this.
- Your **strategic plan**, if you have one, will help provide a current picture. If your plan is a long and detailed document, you may want to provide candidates with a few key pages or an executive summary.
- Your organization's **Annual Report** or a copy of your last **Auditor's Report**
- It is essential that you include a **board member position description** indicating responsibilities, level of authority, and time commitment expectations inside and outside of board meetings.
- List of **existing board members and staff**

If your board is actively involved in fundraising, the expectations of board members in regard to their own contribution and their campaign responsibilities should be indicated.

### **Recruitment Infrastructure**

Ideally your board should not have much to do from year-to-year putting together a recruitment package. You want your energy to be on identifying and cultivating board member prospects.

## Your Website

Giving your board a visible presence on your organization's website is a basic step. A visitor should be able to click on your board or governance page and see the following:

- The role of the board
- Who is eligible and what skills are needed
- Current list of board members
- Recruitment process steps
- Annual General meeting (when it is normally held)
- For more information contact

You just want a few sentences on each of these items apart from the board list. With respect to the board list, some organizations go so far as to post pictures and bios of their board members. You do not need that level of detail; director names and board positions will suffice.

## Director Application Process

Many organizations take the approach that they want to invite people to *apply* to serve on the board. That means that not all invitations or nominations result in automatic board membership. Indeed, an interview with potential board candidates, once they have expressed interest, is a good practice.

Smaller non-profits, in particular, may want to consider posting a board application form on their websites. Creating one helps focus the board's attention on the process and posting one provides some transparency, gives greater visibility to the board, and signals that you are always on the lookout for people to join the board team.

A one-page board application form (see below) can ask for information on a candidate's experience, why they are interested in your organization, what they bring to the board, what they expect as a benefit from serving as a volunteer board member and what other volunteer commitments they may have. A board discussion of what information to ask is a very useful one

It is fine if you do not rely on this form, or expect candidates to come forward because of it. The application however, serves as a guide and puts your board recruitment out there for all to see.

## Board Member Agreement

Some organizations ask board members to read, date and sign a board member agreement, essentially a statement of responsibilities (the person to the organization, the organization to the board member). If you employ this, a sample copy should be included in your recruitment package.



*East River  
Community Association*

Board Application Form

Date \_\_\_\_\_ Nominator (if any) \_\_\_\_\_

Name \_\_\_\_\_ Phone \_\_\_\_\_

E-mail \_\_\_\_\_ Address \_\_\_\_\_

Relevant experience and/or employment (attach a resume if relevant) \_\_\_\_\_

Why are you interested in our organization? \_\_\_\_\_

Area(s) of expertise/contribution you feel you can make \_\_\_\_\_

Other volunteer commitments \_\_\_\_\_

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**Thank you** for completing this application for board membership. Please drop it off or mail it to us in care of the Board of Director. We will be back in touch with you.