

# **11 Creative Ways to Find New Board Members (and Engaging Board Orientations)**

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## **Agenda**

- Review of the Board Recruitment Process
- 11 Creative Ways to Find Exceptional Candidates
- Board Orientation
- Additional Resources
- “Engaging Board Orientations” booklet from [www.BoardsThatExcel.com/the-market/](http://www.BoardsThatExcel.com/the-market/)

**My Goal:** You select one or two ways to improve your board member search and orientation

## **Review of Board Recruitment Process**

- Board Development Committee leads
- Starts at the beginning of each year
- Starting point: Skills needed
- First Board Meeting: Board Recruitment Priorities
- All communication with candidates handled by the Board Development Committee
- Board votes on new members at the same, near-end board meeting each year
- Notification of selection and welcome by phone call and official letter from the (new) Board President

## **11 Creative Ways to Look for Exceptional Candidates**

- General Comments about your search
- Ways to publicize your search
- Internal Searches
- External Searches

## **General Comments about Your Search**

- Looking for Board Candidates is good PR
  - Take the opportunity to share your client stories
  - Share statistics about your community and your work
- Don't look or act desperate
- Keep the end in mind:
  - People with a particular passion for your work
  - Skills and experience you need
  - People with time and energy to do what you need
- In the process, you may find good Volunteers and/or Board Committee Members
- Remember: You are talking to potential donors

## **Ways to Publicize Your Search**

1. Post on your Web Site
2. Post on Volunteer Web Sites
  - United Way
3. Put an ad in the newspaper
  - Free notices in the business section?
4. Post a sign in your lobby

## **Internal Searches**

5. Create a system to follow up thoroughly
  - If “no time” – then hold name for another year
6. Talk to ex-board members
7. Send an email out to your members or volunteers or clients
8. Create “feeder teams” of board candidates
  - Volunteers
  - Non-Board Committee members

## **External Searches**

9. Major Donor Brainstorming Breakfast
  - Keep the breakfast strictly to one hour
  - Explain your Board Recruitment Priorities
  - Share the Board Recruitment Packet
  - Ask for help thinking of potential candidates
  - Follow up with attendees in one week
  - Contact all potential candidates
  - Include ex-board members in this breakfast

## **External Searches (con't)**

### **10. Human Resource Departments**

- Lawyers, Accountants
- Make an appointment to speak with them
- Share the Board Recruitment Priorities
- Share the Board Recruitment Packet
- Seek candidates who are interested in your work
- Follow up with each candidate individually

Look for Human Resource specialists for your board.

## **External Searches (con't)**

### **11. High Schools, Community Colleges, and Universities**

- Look for Departments that complement your work
- Make contact with the Department head through the Administrative Assistant
- Share your Board Recruitment Priorities
- Share your Board Solicitation Packet
- Seek candidates that have an interest in your work
- Follow up with each person individually

## **Board Member Orientation**

- Getting started
- Annual Board Orientation
  - Agenda
  - Handouts and information
- Ongoing Orientations

NOTE: Orientation is critical to the success of the board member experience.

## **Orientation – Getting Started**

- Board Development Committee is Responsible
- Annual Orientation
  - Same time, same place, same agenda
  - Include new and ongoing board members
  - Keep it informative and interesting
  - Develop camaraderie
  - Seek feedback from each “class”
  - IDEA: Have one “class” help improve and deliver the orientation of the next
- For those who miss the orientation: a standard alternative review with another board member

## **The Orientation Session – The Agenda**

- General
  - Welcome
  - Obligations of Board Members
- Organization-specific
  - Mission Statement – memorize
  - Staff organization, Priorities for the year
  - Budgets, Fundraising, Expense categories
  - Strategic Plan
  - Partners and Program Specifics
- Board Specifics
  - Annual Personal Contribution
  - Committee assignments and priorities
  - Board Calendar, events, and obligations
- Q&A, Discussion, and Socializing

## **Ongoing Orientation Ideas**

- Buddy System – match continuing with new board members
  - Have buddies sit together at board meetings
  - Invite new board members for coffee
  - Invite new board member families to socialize
- Create Ad Hoc Committees that include new and continuing board members
- Expose board members to the organization
  - Staff meetings
  - Special Programs with Clients

## **Creative Searches Summary**

- Publicize
- Internal Sources
- External Sources

Be sure to professionalize your board search with a Board Solicitation Packet.

## **Engaging Orientations Summary**

- Make it an annual habit – same time & place
- Combine new and ongoing board members
- Look for ways to mix new and continuing board members
- Continue orientation throughout the year



## Additional Resources

- Best Practice Booklets
  - [www.BoardsThatExcel.com/the-market/](http://www.BoardsThatExcel.com/the-market/)
  - 10 other booklets (planning, boards, committees)
- Articles about boards and organizations
  - [www.ezinearticles.com](http://www.ezinearticles.com)
  - Search for “Alyson Ball”
- Teleconsulting with Alyson
  - [www.BoardsThatExcel.com/ask-alyson/](http://www.BoardsThatExcel.com/ask-alyson/)

## Conclusion

- Questions ?
- Comments?
- General Discussion

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