BUILDING YOUR BOARD

Experts share ideas for finding and recruiting the right members for your board.

Cultivating new board members is vital to a nonprofit board's long-term effectiveness, yet it remains one of the hardest tasks a board faces. In a recent webinar titled "Great Nonprofit Board Recruitment," a panel of nonprofit board experts discussed the challenge of recruitment. In the discussion, they agreed that bringing in new members remains tough, and they shared recruitment strategies they have found effective. The webinar was put on by BoardSource, a national organization focused on good governance practices for nonprofit boards, and sponsored by BoardEffect, which makes board portal software for board management.

According to Ruth McCambridge, editor in chief of Nonprofit Quarterly magazine and one of the webinar speakers, peopling boards properly is a critical, top-of-mind issue — and a near-constant topic when she discusses board governance.

"Getting the people right [on the board] is fundamental," states "Leading with Intent: A National

Index of Nonprofit Board Practices," a 2015 report from BoardSource. Despite the importance of recruiting the right board members, the BoardSource report found that only one in five chief executives strongly agrees that they have the right board members. And because boards have slowly shrunk over the past 20 years, "it's especially important to carefully compose the board," the report stresses.

Issues of governance in general, including recruiting, have been made more challenging in the age of the Internet and social media. New tools and ways of communicating — including websites and social media feeds — make boards much more transparent. Board business and members are exposed to increased public scrutiny, something board leaders should help new members understand.

While transparency is good in many ways — it can bring wider attention to a board and thus aid with recruitment — it is also a double-edged sword, bringing new challenges for board members.

"Is your board ready for the greater transparency and engagement of today's board?" asked panel member Anasuya Sengupta, with Nonprofit Quarterly magazine.

Among traditional approaches to peopling boards, the self-perpetuating approach is the most common. In that model, current board members bring in new recruits. But that can be an issue for boards striving for greater diversity in their communities — as most boards either are or should be. Diversity means bringing in board members with different ethnicities, backgrounds, economic strata, outlooks and life experiences. Unfortunately, self-perpetuating boards tend to continue to mirror their current makeup, as board members naturally invite people they know and are comfortable with.

To break that pattern and choose new members from a larger pool, McCambridge recommended using ad hoc committees to selectively sift through potential interested parties for solid new board members. Inviting interested outsiders to join small ad hoc committees is an excellent way to screen and cultivate new board members. Of course, diversity remains an issue unless board members make a conscious, concerted effort to invite a wide range of community members to participate.

With the committee method, someone who expresses an interest in a specific area of the board's mission is asked by the board to serve on a temporary committee, an assignment that typically lasts just a few months.

The committee approach has a number of advantages, McCambridge explained:

- It is much easier to recruit someone initially to a short-term engagement rather than a two-to six-year term on the board itself.

- It gives the potential new member a chance to see if the person is a good fit with the board's mission and purpose — but in a temporary capacity. The committee member can assess the board's temperament while observing how the board works

- On the flip side, the ad-hoc committee setting gives the board a chance to observe the potential board member's ethics, commitment and style. Since ad hoc committees make recommendations to the board rather than actual decisions, it's the perfect arena to evaluate a new person's interpersonal skills and behavior within a group. Current board members who are also on the ad hoc committee can observe the "trainee's" skills in a group setting, including speaking skills, ability to compromise and ability to resolve conflicts.

That final benefit — the ability of the board to assess the potential member for ability to work well with a group — is a critical but often overlooked skill in board members, McCambridge stressed.

Before launching a model that uses committees to evaluate board members, the board must be prepared. For example, key questions should be put out to committees to enable them to understand the vetting process for ad hoc committees. ■

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Help new members focus on the mission, not the process

New board members often get bogged down in board processes during orientation, missing what their real focus should be: your board's mission and how they can contribute. After all, any worthwhile board member will have limited hours to devote to your board and many competing requests for attention. The last thing you want is for them to spend time trying to figure out confusing processes, procedures and best practices.

The best way to keep board members from being pulled into minutiae early on is to streamline their access to information to quickly make them functioning board members. To start, picture yourself as a new board member. Ask what tools and information would be most helpful in taking you quickly from newbie to productive board member.

Here are some of the materials a new board member needs easy access to:

- Board mission and structure
- Minutes from past meetings
- Meeting calendar, including ad hoc committee and task force meetings
- Contact information for members, including background and board role
- Meeting agendas, "board book," and supporting materials
- Financial statements, depending on permission levels, and annual reports
- Committee and board member discussions

Now consider how software designed to organize those documents and streamline processes and access to them can help. BoardEffect is one example — a well-known software platform focused specifically on helping nonprofit boards follow best practices in board management and governance. Boards can purchase specific features for the platform — including tools to address each of the materials above.

BoardEffect is board portal software, meaning that it creates a private virtual door for each member into your board's documents and other information. Member passwords allow them to quickly access only the information they have permission to see.

Bringing new members up-to-speed quickly and helping them understand their importance during orientation is critical to a well-functioning board. The right board portal software can make that job much easier for everyone. ■

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BoardEffect was founded when a team of web developers saw a common thread among the nonprofits and educational institutions they served: **the need to make the work of their boards of directors easier, more efficient and more effective.** In 2009, we served 50 organizations.

Today, over 1,400 clients, 2,500 boards, and 100,000 users benefit from the ease, efficiency and empowerment of BoardEffect. We, and they, are just getting started.

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