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Nehemiah Communications is a company that specializes in growing nonprofit organizations and small businesses by providing customized communications and operational services.

Why Every Nonprofit Needs A Board Member Recruitment Process and Orientation Kit

Introduction:

For the majority of nonprofits that I have worked with over the last fifteen years, it is very common to hear the nonprofit's board members wishing for more or higher quality board members. At the same time, these same boards typically do not have a formal recruitment and orientation process. A number of years ago I was given the privilege of going through Service Masters Executive training program and one of the things that they emphasized, was how their research showed a relationship between reduction in turnover rate/employee satisfaction and the length/quality of their orientation process. The big takeaway was that the more an employee understands what they will be doing and what the expectations are the better they can fit in and feel useful. This should be even more true for nonprofits where most board members do not (or generally should not) receive compensation.

Recruitment Process:

While methods vary from organization to organization, in general, most successful boards have a four step process.

1. Board Member identification and contact. Before an individual is recruited it should be clear to the board why they are interested in the individual being recruited for the board and the board needs to be comfortable with how this will be presented. If the board is interested in an attorney and the attorney is desired by the board because of his or her expertise in an area that will help the organization, this should be disclosed. The Board member should understand in the recruitment process they will be providing services at no cost to the organization. Almost, every person who is willing to serve on a board understands that they will be expected to give direction to the organization, support it financially (either through their own giving or through helping the organization obtain external funds or both) and give their time and talents.

   Next, a board member needs to be selected who has the best chance of obtaining a meeting with the desired individual. The board member then contacts the individual to try to set-up a meeting. Depending on the nature of the board this may be a simple cup of coffee, but most times this is a lunch so both parties have the meal time to get to know each other. Once a date is agreed, a confirmation e-mail should be sent that also includes a link to the organization's website and any e-flyers or other materials. If the individual says “no”, consider asking them who they might know who would be similar to them who is a good fit. I know of, or personally recruited, a dozen high-quality board members just by asking this question (I usually ask for permission to use their name when I make the contact).

2. Initial Meeting. This is the time to not only expose the individual to the organization, but also it is important to get to know the person. The board should be open to the fact that everyone one who gets to this step still may not be recruited. I highly recommend that two representatives from the organization attend the meeting, either two board members or a board member and the executive director. Once both parties are comfortable with each other than one of the board members should share the new board member kit with the prospective board member (see details on the kit at the end of this document). One mistake I see in this step is to set the expectation levels too low. One of the boards that we have worked with the longest takes the opposite approach during recruitment meetings. They explain that they are a working board and prospective members are warned not only is the expectation that they will be assigned some projects, but the expectation is that over time they will challenge themselves to find areas where they can improve the organization and proactively volunteer themselves in these areas. People want their time to be valued and matter. Instead of being a turn off this actually has helped this organization recruit senior federal officials, a former state Governor, University Professors, Accountants and Attorneys and they all work and all give. However, the expectation should not be to recruit the board member at this meeting (this might be a good sales approach, but not a recommended approach for board recruitment). Instead, set a time to contact them within the next week and let them know that if they are still interested then before they decided you would like to invite them to attend your next board meeting.

3. Second Meeting. This meeting is almost always a board meeting. Sometimes organizations recruit a number of individuals at the same time and have a more "staged" board event. Instead of this I would recommend only having a second meeting with one or two prospects at a time. The meeting should reflect how a normal board meeting is handled. You are trying to help the individual to know what to expect and to see if this is a fit for both parties. Try to engage the prospect so they feel free to contribute to the discussion. After the meeting, if the board approves the prospect, (if the board meets infrequently this should be done by e-mail if by-laws will allow it) then within the next few days the prospect should be offered a board seat.

4. Acceptance. Once the prospect has accepted they should be provided with the organization's meeting schedule and location and contact numbers for key members of the board and the board likewise should confirm the prospects contact information (some individuals initially share business contact information but change it to personal).

Elements of a Great Board Member Orientation Kit

- Table of Contents.
- Statement of Purpose or Belief also known as Statement of Charitable Purpose. This is a short description of who the organization is, what it does and how it does it. It is critical that this should match the intent of what you have both on your website and on documents filed with the IRS (e.g. Form 1023 or 990). Every board member should be able in their own words, to share this statement in a consistent fashion.

- Executive Team and Board Members. If this is on the website it still should be printed and put in the kit. This is the name and description (generally one paragraph) of each board member and if they serve in a role (Chairman, treasurer or secretary) these should be indicated as well as noting if they are serving on any permanent committees.
- Role and Responsibilities of the Board of Directors. The format of this varies based on the organization, but it can be a job description or a letter that outlines all the major commitments. They should include at a minimum the time and financial expectations. I have been personally asked by three different funding sources if all board members give to the organization and many funders will not contribute to organizations that do not have a 100% annual board contribution policy. Meaning even if the board does not set dollar values, it ensures that all board member contribute financially on an annual basis.
- Board Meeting Calendar. Boards that set their meetings schedules annually will have more consistent attendance by board members.
- Board Meeting Minutes. It will help the prospective board member if they are able to review a number (usually at least the last years worth) of board minutes to help them understand what the board has been focusing and working on.
- IRS Form 990 (previous year). This is the best way to allow them to see a wide range of information on your organization. If you are under the filing minimum or you file the 990 then the last fiscal year reports which should include a Profit and Loss statement, Cash Flow statement and a Balance Sheet.
- By-Laws.
- Disclosure Statements (if used). Individual board members have an obligation to disclose any potential conflicts of interest. There is increasing pressure for board members to provide in writing a disclosure statement that has them list any other boards they serve on, any vendors for the organization that the board member receives benefits/compensation or business from, and any personal or professional connections that are in competition or working against the interests of the organization.
- Recent Newsletters, Publications or Case Statement for the Organization.
- Statistical Report (if applicable). How does your organization document its success? Every organization should track its progress and report it in a consistent manner that can be tracked over many years to give the board a guide post of the organization's effectiveness.
- Declaration Pages of Key Insurance Policies Including:
    1. Directors and Officers/Errors and Omissions Policy. Board Members can often protect their personal assets if the organization is compliant with state/federal laws, carries D&O insurance and indemnification of directors against attempts to hold them liable. Seek legal counsel in your state for more details.
    2. Some Nonprofits may also need General Liability Insurance and if your board does this declaration page should be provided.
    3. If the Nonprofit has employees they may want to also consider an Employment Practices Liability Insurance and again if obtained this declaration page should be provided.