

Board Development Best Practices

Recruit, Orient, Mentor and More



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Best practice notes: The following steps and principles have earned the test of time. Your board may have different practices depending on its relative formal or informal nature, board size, how frequently it meets, or your required bylaws. Please implement these “Best Practices” with care, always looking for new ways to improve or enhance your board’s effectiveness. Enjoy!

1. **Develop a board profile.** The profile is an agreement among existing board members, staff, former board members and other stakeholders about what qualities should exist on the board of directors. These “qualities” might include geographic representation, age, gender, ethnicity, professional marketing, finance, education, real estate, fundraising, grant/proposal writing experience and more. Strategic thinkers are increasingly prized. All candidates must exhibit passion for the organization’s mission.
2. **Complete a board matrix.** Once there is agreement on what qualities would constitute a strong board, assess the existing board to determine what gaps exist. Usually this is accomplished with a chart displaying qualities on the top axis and possible candidates on the side axis. Generally, board member qualities are selected based on the what supports the strategic plan’s needs or are important for achieving your organization’s specific mission. Your bylaws may dictate certain geographic representation or other features.
3. **List candidates.** From the gaps, the Board Development Committee (also known as Board Governance Committee) begins gathering potential board member candidate names. Gather candidate names from the same stakeholders who developed the profile. Stakeholders might include existing top donors or funders. Prioritize the candidate list.
4. **Contact the highest priority candidates.** The Board Development Committee, or the person supplying the candidate’s name (if there is a personal relationship with the candidate), calls the candidate and asks for a meeting. The meeting’s purpose is to talk about the organization, its goals and needs, and the candidate’s possible board involvement. Usually the meeting lasts about 30 minutes.
5. **Meet with the candidate.** A staff person and a board member (preferably someone the candidate knows) meets with the candidate to review the organization’s mission, the board’s role, and to talk with the candidate about her interest in learning more and being a part of the organization.
6. **Candidates apply.** If the candidate expresses an interest in board membership, he or she is asked to complete an application. The application may include questions about previous board or other nonprofit experience and priority nonprofit interests. If the candidate declines interest in board membership, he may be asked about interest in serving on a committee, being invited to events, receiving the newsletter, or some other way of becoming involved.
7. **Review applications and vote.** The Board Development or Governance Committee reviews applications and, if acceptable, brings the nomination to the board for a vote.
8. **Orient new board members.** Once approved, the new board member is invited to the facility for an orientation. Depending on the organization, the spouse may also be invited, since the spouse’s approval and support will make the board member’s participation more meaningful. A facility tour is included along with staff introductions. A board manual is presented and reviewed briefly. The board member is encouraged to review the manual in detail prior to the first board meeting.

9. **Mentor new members.** An existing board member is assigned as a mentor to the new member for a period of 6 to 12 months. They may discuss organizational culture, meeting flow and expectations, and program context, as needed.
10. **Introduce new members to the board.** The new board member is introduced to the board of directors at the next meeting. A social time is scheduled either before or after the meeting to get to know the members on a personal basis.
11. **Mentors follow up.** The mentor continues his or her duties as described, including: reviewing the responsibilities after 3 months, asking if the new member is comfortable with her participation, and if any additional information is needed to make membership more meaningful.
12. **Train new members.** All board members receive on-going training in board responsibilities as needed. Additional training needs are determined by the Board Development Committee.
13. **Evaluate.** The Board Development Committee conducts a periodic board member self-evaluation. The evaluation is completed by every board member and includes questions about board performance. In addition, each board member assesses his own performance as well. This evaluation takes place at least every three years or more frequently as determined by the Committee.

"Without involvement, there is no commitment. Mark it down, asterisk it, circle it, underline it. No involvement, no commitment." ~ Stephen Covey

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