



# Nonprofit Founders Society

## Implementation Guide

February 2023 | Create a Board Vetting and Recruiting Process

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# Nonprofit Founder's Society Implementation Guide

## Video Content

### Introduction

Hi and welcome to this month's lesson: Create a Board Recruiting Process. This month we are learning why a Board Recruiting Process helps you find and attract great Board members and what that process looks like.

### What is a Board Recruiting Process?

A Board Recruitment Process is how an organization finds, attracts, confirms, and welcomes a new Board member. This process can take anywhere from 30 to 90 days.

### Why do we need a Board Recruiting Process?

A Board Recruiting Process helps take the weight off of one person, often the Founder, for finding new members. It also helps you be uniform when recruiting so your Board members are all on the same page. As a new Board member, I know how important that is.

### My Board Story

I had a meeting with the Founder. The Founder shared her vision, mission, excitement, and passion for her new Nonprofit. She told me why she started it and what drove her during the daunting process of creating her Nonprofit.

By the time it was over, I was hooked and ready to go!

At the first Board meeting, I was introduced by name and current job but no introduction with what I brought to the table. What talents, skills, or experience the Board could use was never said. Others were introduced very candidly with things like- so-and-so has marketing experience or so-and-so knows so many people in the community. But not me. So I waited.

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By the second meeting, the majority thought the thing to do was gain awareness and an event was the way to go. My opinion was to work the steps in the guide (although, all those steps were still in my head at the time!)

I knew a good foundation in management and fundraising would pay dividends. My opinion was ignored because the majority wanted to do the shiny things instead of rolling up their sleeves and setting the organization up for success.

We had the event and it was deemed a success. But events take money and now the Board wanted to think about fundraising.

...But without the foundations and systems in place, without a program for donors and funders to donate to- there was not a lot that could be done to raise money.

They would still have to go back to Step Two to get going. They had wasted a lot of time!

After one year, the organization had barely determined who they were, what they wanted to do, or how they were going to do it.

The most discouraging part was spending nine months on a Board just to find out the Founder's vision I had bought into wasn't the same vision as the majority of the Board! I left at the end of my term because it was painfully clear I was spending a lot of time on an organization that I hadn't bought into. It felt like a bait and switch!

Even sadder, the nonprofit folded six months after I left.

### **What/How**

The Implementation Guide has more information and templates for you. The Nonprofit Startup Library has samples and templates for some parts of the process, like Policies and Procedures. Let's talk about the process.

### **Board Recruiting Process Overview**

## **Nonprofit Founder's Society Implementation Guide**

- Decide on what the organization needs
- Find Candidates
- Vet and Screen Your Candidates
- Provide A Board Orientation

### **Organization's Needs**

- What skills does the organization need to succeed?
  - a. Board Matrix

### **Finding Board Members**

- Potential Board Member Package
- Out of the Box Ideas to Find Board members
- Create a list of Boards members you want
- Create a Follow-up Plan

### **Vetting Process**

- Application
- Board Committee

### **Board Orientation**

- Information Needed by Board Members
  - a. Board Orientation
    - i. General Organization Information
      1. Mission & Vision Statement
      2. Bylaws
      3. Operating Principles
      4. Policies & Procedures (Conflict of Interest, Non-discrimination, Child Protection, Anti-terrorism, Staff/Volunteer Handbook, Social Media, etc)
      5. Board Member Names/Contact Info
      6. Application for New Board Members (to share with prospective board members)
    - ii. Finances

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1. Current Operating Budget
  2. Capital Campaign Budget/Items
  3. Program Budget Breakdown
  4. Breakdown of Signature Program
  5. Income/Expenditures
- iii. Programs
1. Overview/Summary of Programs & Fees
  2. Impact Reports
  3. Testimonies, Stories, & Photos
- iv. Events
1. Calendar of Events
  2. Promotional/Marketing Materials to distribute (insert 5-10 in each folder)
  3. Request Letters (for sponsorship/support of events; insert 5-10 in each folder)
  4. Procurement Forms (simple spreadsheet for board members to note contributions/contacts that they have made on behalf of the organization)
- v. Action Items
1. Board Engagement Form
  2. Strategic Plan with Status Report Column
  3. Board Building Exercises or Resource Sharing Tools
- Ways to Orient Board members
- a. Asana
  - b. Google Groups
  - c. Physical Binder

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## Implementation Checklist

### Board Recruiting Process Overview

- Decide on what the organization needs
- Find Candidates
- Vet and Screen Your Candidates
- Provide A Board Orientation

### Organization's Needs

- What skills does the organization need to succeed?
  - a. Board Matrix

### Finding Board Members

- Potential Board Member Package
- Out of the Box Ideas to Find Board members
  - Circle of friends and neighbors
  - Professional and business contacts
  - Other nonprofits
  - Professional associations
  - Major corporations and their community outreach programs
  - Local businesses
  - Local nonprofit support organizations, United Way chapters, or community foundations
  - News or printed media featuring community leaders
  - Referrals and word-of-mouth:
    - i. The first place to start is with the standard request for referrals from
      1. existing board members
      2. and volunteers.
    - ii. Ask your existing team to look for candidates from among:

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1. Friends
  2. Family
  3. Colleagues and associates
  4. Neighbors
  5. Community members (at church; clubs; sporting teams, etc.)
  6. Donors
- iii. Publicize within your network:
1. To identify candidates from a wider network, consider:
  2. Writing a newsletter article or a post on your organization's blog or forum
  3. Posting a request on your Facebook page
    - a. Posting a compelling video or photos of last year's event on your FB page and ask for new recruits (follow-up with anyone that "Likes" your post)
- iv. External promotion:
1. You might need to widen your search to include:
  2. Putting an ad in your community newspaper
  3. Using online resources to find candidates:  
You can consider finding candidates using some online matching or volunteer programs such as:
    - a. [www.boardmatch.org](http://www.boardmatch.org)
    - b. boardnetUSA — A free resource to help nonprofit organizations find board members, and board candidates to find service opportunities.
    - c. LinkedIn Board Connect
    - d. [www.idealists.org](http://www.idealists.org)

## **Nonprofit Founder's Society Implementation Guide**

- Create a list of Boards members you want
- Create a Follow-up Plan

### **Vetting Process**

- Application
- Board Committee

### **Board Orientation**

- Board Orientation Book



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## **Templates**

Please Make a Copy of the Templates

[Board Matrix](#)

[Potential Board Member Package](#)

[Board Member Application](#)

[Board Orientation Book](#)