

Recruit, Train, and Equip an Effective Board



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At the core of a thriving nonprofit, you will find an effective board of directors. When functioning well, your board can add value, identify long-term opportunities and challenges, and provide deep advisory insights to an organization. Dynamic, engaged, and well-equipped board members can provide strategic leadership, help ensure financial stability, and hold the organization accountable to its mission and constituents. The risk for many nonprofit executives is that busy schedules can keep them from realizing the wealth of opportunities that arise from structuring strong, healthy board relations. Most of the extensive research on nonprofit boards agrees that building an effective board requires a thoughtful and sustained effort encompassing three key pillars: recruiting, training, and equipping. Focus on these pillars to position your board to provide the leadership your mission deserves, including perspective on the strategic risks the organization faces.

Recruiting for a Strategic Board

How you recruit your board members shapes how your board will execute their responsibilities. A reactive approach of filling board seats by looking for volunteers on the basis of their friendship with the executive director or current board members can lead to a disengaged and underprepared board. By contrast, a deliberate, proactive process is much more likely to result in a board composed of passionate, skilled, and knowledgeable people ready to serve as true partners in advancing the mission. Recruitment starts long before you discuss any possible candidates. The following steps can help.

Create a Recruitment Packet

An important piece of board recruitment is having the materials you need at your fingertips. Essential board recruitment materials include:

- Board position description
- Board pledge
- Copies of organizational policies
- Document or matrix identifying skills or perspective gaps in current board composition
- Goals for incoming board leadership

Before recruiting anyone, review and revise your board recruitment packet documents. An up-to-date board position description signals prospective board members what their roles and responsibilities will be. A board pledge helps both new and current board members understand important do's and don'ts. If your board requires participation in fundraising, the position description should reference the expected financial give/get requirements. Provide access to board governance policies and procedures, especially your up-to-date bylaws and conflict of interest policy.

Do Your Homework. Frontload your recruitment process by doing the work to identify the type of members you need to bring onto your board. The goal is to curate a board in which your members' individual knowledge base and expertise can complement each other. Use a series of prompts to guide your process, such as:

- Do the skills, experience and backgrounds of the people gathered at your board table make sense within the context of your organization's vision, mission, and goals? What about your business model and strategy?
- Are there gaps in the board's make-up, skills, and backgrounds that would make a real difference to include in your board discussions?

You can create a simple matrix for tracking this, listing any types or number of professional areas of experience that would be useful for your board.

Expand Your Candidate Pipeline. When a board position opens up, it is a common practice to share the opportunity across multiple platforms. But in reality, board recruitment is an evergreen activity. You can be recruiting anytime and all the time. This means you don't need to wait until there is a board opening to think about potential board members. You can expand your pool of potential board members by leveraging existing relationships with current donors, committed volunteers and, sometimes, former staff members. This can provide you with potential board members who are already passionate about your mission. You can also encourage current board members and staff to reach out to people in their professional networks. If you have interested but slightly hesitant potential members, invite them to serve on a committee, attend an event, or observe board meetings. These low-risk activities represent opportunities for mutual evaluation of "fit" with your organization.

Provide a Thoughtful Interview and Selection Process. A transparent and engaging interview process for a nonprofit board is a mutual exchange, giving both the candidate and the organization a chance to determine if their goals and values align. The process should go beyond a single interview; be structured as a discovery conversation; and be informative, respectful, and comprehensive.

The first interview is typically a one-on-one or small group meeting between the candidate and a member of the nominating or governance committee. The goal is to build rapport and gather initial information. Here are some materials to help shape the interviewing process:

Questions for the candidates:

- What aspects of our mission are most meaningful to you?
- Describe a time you served on a board or worked with a nonprofit. What was most challenging and most rewarding?
- What are your expectations as a new board member?
- Are you comfortable making a financial contribution that aligns with your circumstances and our give and get policy?
- Information for the organization to share:
 - Details about the organization's history, successes, and current strategic goals.
 - An honest and realistic overview of the board's work, including challenges and time commitment.
 - A discussion of the candidate's own questions and priorities.

If the first interview goes well and both the prospect and interviewer recommend proceeding, a follow-up conversation with the Executive Director (CEO) is an excellent next step.

Training for a Strategic Board

Engaging a new board member from their first day of service until they term off requires seamless information flow and support. That process starts with onboarding and providing the information a board member will need to be an effective leader on your board.

Comprehensive Onboarding. A well-planned orientation is critical for setting new board members up for success. An effective onboarding process should be led by a team that includes the board chair and executive director and should cover:

- **Mission, Vision, and Values:** A deep dive into the organization's purpose, history, programs, and strategic plan to ensure mission alignment.
- **Governance Documents:** A review of bylaws, key policies (e.g., conflict of interest, whistleblower), and board meeting protocols. Aim to provide a well-organized packet of information containing all essential documents.
- **Roles and Responsibilities:** The board position description should set forth duties and responsibilities and expectations. Some nonprofits have a separate document explaining give and get expectations and a board pledge related to expected do's and don'ts.
- **Financial Overview:** An explanation of the organization's finances, including the budget, recent financial statements, and the most recently filed IRS Form 990. The goal is not to turn every board member into an accountant but to ensure everyone has access to materials that help them understand the nonprofit's key sources of revenue, major expense categories, and financial health. Every board member has equal responsibility for financial oversight, so providing a window into a nonprofit's finances is essential to help board members discharge that responsibility. An orientation can be a comfortable, informal opportunity to ask the kinds of financial questions that might seem "in the weeds" at a board meeting.
- **Meet-and-Greets:** Opportunities for new members to meet staff, tour facilities, and engage with program recipients or volunteers to connect with the mission on a human level.
- **Mentorship:** Pairing a new board member with an experienced peer mentor can help them acclimate to the board's culture and provide a trusted resource for questions.

Continuous Education and Development. Board training should not end after orientation. A culture of continuous learning keeps the board engaged, informed, and adaptable to a changing landscape. You can provide:

- **Learning Opportunities:** Incorporate short, educational segments into regular board meetings, inviting guest speakers or assigning relevant articles and books for discussion.
- **Annual Retreats:** Schedule dedicated retreats to focus on long-term strategy, complex issues, and board development.
- **Professional Development:** Encourage and support board members to attend external workshops, conferences, or webinars on topics like governance.
- **Self-Assessment:** Implement a regular (e.g., annual) board self-assessment process to evaluate the board's collective performance and identify areas for improvement.

Equipping a Strategic Board

Beyond providing tools, equipping a board involves building and fostering a culture of engagement and accountability for and with your board. Here are some steps to do so.

- **Define Roles and Expectations.** Revisit and reinforce board member expectations and committee assignments to ensure clarity of purpose. This prevents burnout and clarifies individual contributions.
- **Celebrate Contributions.** Acknowledge and celebrate board members' efforts and contributions, whether through formal recognition or informal thank-you notes. Acknowledging that board members are volunteers who give their time and resources is key to retention.
- **Evaluate Regularly.** Use the annual board self-assessment not as a punitive exercise but as a tool for

continuous improvement. Discuss the results to address challenges and create an action plan for the coming year.

- **Cultivate a Board-Staff Partnership.** A healthy relationship between the board and the executive director is paramount to a nonprofit's success. The board equips the executive by establishing clear expectations, regular check-ins, and working to build and foster a supportive, trusting relationship. Conversely, the executive equips the board by providing them with timely, transparent, and comprehensive information. A strong partnership requires clear boundaries, with the board focused on governance and strategy and the executive managing day-to-day operations.

Don't Skimp on Board Prep

Recruiting, training, and equipping a nonprofit board is a dynamic and intentional process that can improve the overall health of your organization. This is a strategic investment in the organization's future that can ensure sustainable growth and mission impact. If you approach it with the same care you bring to other aspects of your organization's risk journey, your nonprofit will be richly rewarded.

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