Board Recruitment: shaping the process

Planning *(1-4 wks)*	Key steps and questions	Notes
Clarify the timeline *(See section below on process/ timeline)*	• When do new terms begin? • What other milestones or important dates do we need to consider? • When do we want to start reaching out to candidates? (**Tip**: plan for ~3-5 months before terms begin.)	
Review the current recruiting process	• Does everyone involved know the steps we'll be taking? Any changes needed?	
Clarify the recruitment goals	• How many positions do we need to fill? • Assuming that not all candidates will be interested or available, how many candidates will we aim to approach? (**Tip:** aim for ~2-3x the # of vacancies.)	

Assemble and update the relevant tools and doc's	• What documents will we use to introduce candidates to our board and organization?
	    ◦ Board job description?
	    ◦ Board commitment form?
	    ◦ One-pager of talking points about key priorities for the board and organization? Etc.
	• Will we use a board application?	

Identify other opportunities for volunteer involvement *(It's useful to approach board recruitment as a long-term process, and to use task forces and committees as a recruitment pipeline.)*	Aside from serving on the board, what opportunities do we have to involve people in the work of the organization, either as a way to get to know candidates and/or in the event that board service isn't the right fit? • What committees or Task Forces will be active this year? • In what areas might candidates be able to contribute as strategic advisors? (For example, what initiatives would benefit from outside expertise?)	

Preparation *(~1 mo.)*	Key steps and questions
Assess recruitment needs	- Look at current make-up of board to identify gaps. (Skills, strengths, demographics, etc. See *Board Recruitment Matrix*.) - Review org's strategic priorities to identify priority skills, strengths, etc.
Review past recruitment efforts	- Are there past candidates who might be a good fit this year? - What else have we learned from past recruitment efforts?
Announce vacancies	Request nominations in community listings, etc., as appropriate.
Brainstorm candidates	Involve board and staff to develop/update master list of prospective candidates. (See *Worksheet: Recruitment Brainstorming.)*
Prioritize candidates and make a recruitment plan	- Board Development Committee identifies top candidates to approach. - BDC maps out and recruits the key contact for each candidate, and sets target dates.

Recruitment process/timeline (for a self-generating board) *(3-4 months)*

What (one example)	Target date
Key contact (as identified) reaches out to candidate to request a meeting.	
Meeting takes place with board member(s) and/or staff as soon as possible: - Discuss organizational priorities, why you're excited to be involved with the organization, and why the candidate was suggested. Discuss range of involvement opportunities (board, committee, task force, advisory role, etc.) - Balance enthusiasm and diplomacy: Express your views about why this candidate would be a strong contributor AND let them know that the board is talking to more candidates than there are vacancies (so, the board may face some hard choices, and not all conversations will lead to a nomination.) - Gauge interest and fit; discuss process and next steps. (Possible next steps: invite candidate to visit a board meeting; request a letter of interest and bio.) - If appropriate, ask if they have names to suggest for other candidates. - Thank them for their time and interest, and commit to update them.	
Candidate submits letter of interest and a resume/bio, or other doc's as determined by Board Development Committee.	
Candidate attends board meeting as a guest.	
Key contact confirms the candidate's interest/availability/fit for board role.	
Board Development Committee recommends a slate of candidates.	
Key contacts update any candidates who aren't recommended for appointment.	
Board votes to appoint new members. Following vote, E.D. and/or board chair reach out to new board members with info about first meeting, orientation, etc.)	