

Process for courting candidate board members

Draft 11/15/2012

Interviewing and Vetting Board members

Draft 11/15/2012

1. Begin with a general interview to get to know the candidate. Do a formal presentation and Q&A. Don't yet make any offers or requests to join the board. Simply talk about the organization and express a general interest to get them involved in some capacity. Bring packet of info to meeting.
2. Follow up with a thank-you card or some kind of personal touch.
3. If this seems like a good candidate, take the candidate name to the Leadership Committee. Decide if the committee wants to move forward with this candidate. If not a good board candidate then consider whether they might be recruited to a committee and the name and contact is sent to ED.
4. For Board candidates, follow up with "references" (really a subtle check with people they know), talk to people that have served with them on boards or committees. Find out if you really want them.
5. Once there is buy-in then decide how to recruit this person and candidate gets a board application and it is returned to the Leadership Committee before the next meeting.
6. Schedule a meeting between the candidate, the ED and a different member of the Leadership Committee, if possible. Make the ask personal. Wine and dine, woo them. Include the spouse or significant other (you need their support as well for this board member to be successful)
7. Identify specific skills that you see in that candidate and articulate those directly. Let them know why they are a good fit for your organization and what you feel they can contribute to your board.
8. Speak to the candidate with complete transparency about the good, the bad and the ugly. Don't hide what is really going on within the organization.
9. Ask the candidate what they would like to get out of a board experience, what they enjoy, what they believe they could contribute to your board.
10. Candidate is invited to visit a board meeting.
11. Board votes on candidate.
12. Make the ask and give 48-72 hours to make a decision.

Bringing on new board members - Orientation

1. Orientation before the first board meeting
2. Name tags or name table tents at every board meeting.

3. Make sure that conversation incorporates information that brings new board members up to speed in terms of conversations about projects, names of key players in organization, etc.
4. Invite them to a rehearsal. Have a current board member attend with them.