

Enlist Your Dream Team Board

How to enlist the right team who can catapult your organization to a whole new level.

Never doubt that a small group of committed individuals can change the world. Indeed it is the only thing that ever has.

Margaret Mead

How we enlist and manage our boards has everything to do with their ultimate success, not only in fundraising but in the leadership they offer our organization as well.

There are many factors that play into creating an effective board of trustees for a nonprofit organization.

We all know it is not an easy job. Who is on the board matters of course, as well as how all the members work together. How they are recruited can set up high expectations or lead to failure.

Factors that Impact a Board's Performance

- Who is on the board
- How the members work together
- How they are recruited
- How they are oriented
- How they are led
- How expectations are set
- How they are assessed

Creating a great board may seem like an impossible dream. But it's not.

If you decide that you want to have a high performing board, one that has talented, effective and passionate members who work smoothly together, guess what: it is entirely possible.

The approach you use to enlist new board members can set up your board to be a dynamic team that tackles its charge with energy, responsibility, and heart—or not.

A high-quality, formal, organized enlistment and orientation process will set you apart from other organizations and will ready you and your organization to win.

This workbook will guide you through a step-by-step process to determine what kind of board members you need and a process for recruiting them.

Your Dream Team Board: What Does It Look Like?

Visioning what success looks like is an important step in making it happen.

In the best possible world, **what would your organization – and your board – look like if it were wildly successful?**

- What would be happening?
- How would everyone be working together?
- What impact would you be able to have on the world if everyone were performing at a high level?

Wouldn't it be wonderful to have the most passionate, committed and effective people from your community, those who can make your organization wildly successful?

You simply have to decide that a Dream Team Board is what your organization needs, deserves, and will attain. Then go after it and make it a reality.

If you drive a stake into the ground and make a firm commitment or declaration that this is your goal, then I will venture that you will be successful.

What Does YOUR Dream Team Board Look Like?

- What kind of energy?

- How your dream team members work together

- What type of people?

- What else do you want out of your Dream Team Board?

"I think organizations should absolutely go after their Dream Team boards.

They should seek out the right mix of people who share a common passion for the organization.

You want the right blend of skills and people who will put energy and time into the board's work."

Tom Ross, Executive Director, Z. Smith Reynolds Foundation

Enlistment Versus Recruitment

I like to use the word enlistment rather than recruitment.

Enlistment implies that I am talking about what is possible for our community, and I am asking the new board member or candidate to share my vision.

When I enlist someone, I am evoking their own vision and passion for my cause.

The word recruitment, on the other hand, speaks to me about persuading, selling and even arm-twisting.

When board members are enlisted, they can become our partners and teammates, working together to support a mutual vision for change.

When they are recruited, they may be making a more superficial commitment.

Set Expectations Early

So much of our board members' ultimate performance is based on what is expected of them from the very beginning.

Obviously, board engagement, commitment, and **action all start in the selection and recruitment process.**

If you take a professional, deliberate approach with potential board members, they will react in a similar fashion and take you much more seriously. This is the first step to creating committed, engaged board members.

People, especially volunteers, want to know exactly what is expected of them.

Board members are happier if they know what it will take to be a successful board member. People are typically willing to step up to the plate; they just need clear expectations.

Be clear about expectations and the work at hand:

“This year our board is focusing on . . .”

Or, “in the next three years we have these challenges and this is how the board can be involved.”

WARNING: Be sure, at this time of enlistment, that you do not understate the responsibilities of the job in hopes that the new member will gradually want to take on more.

Say from the start what you want.

The more you ask, and the more clearly you specify, the more people are likely to perform.

So spell it out: “We need our board to . . .”

What are the expectations – both written and unwritten – that you have for your board members?

Teamwork?

Attendance?

Board Giving?

Actions each person is expected to take? (Volunteer, attend fundraising events, host a table, etc)

Committee service?

Leadership?

Others?

Sample Board Member Job Description

Here's a sample board member job description that sets forth clearly the expectations of each board member:

BOARD MEMBER'S JOB DESCRIPTION

- 1) Ensures the fulfillment of ORGANIZATION mission of
- 2) Determines and carries out the policies and purpose of ORGANIZATION which are to
- 3) Ensures sound management, lawfulness, and confidentiality of the business and fiscal affairs of the organization.
- 4) Controls operating funds and capital assets for the use and benefit of the organization.
- 5) Ensures funding for ORGANIZATION by acquiring an annual membership, serving as one of the financial sponsors for at least one ORGANIZATION event per year, and by engaging in other fundraising activities.
- 6) Attends at least two ORGANIZATION events per year, and helps in obtaining hosts for each event.
- 7) Establishes policies for operation of the organization and assumes final responsibility for all policies governing ORGANIZATION.
- 8) Assumes final responsibility for all contracts and leases.
- 9) Hires the executive director who shall be responsible to the board of directors. Ensures a member of the board of directors chairs each standing committee of the board.
- 10) Attends and participates fully in board meetings, which includes taking time to prepare for meetings by reading minutes, reports, and other relevant materials.
- 11) Serves on one of the board's standing committee. (Each board member is expected to serve on one of the board's standing committees.)

- 12) Attends and participates in ongoing board training and development especially the board's annual retreat.

QUALIFICATIONS:

- 1) Be in agreement with the **purpose** and **mission** of ORGANIZATION.
- 2) Be willing to volunteer the time necessary to assume and perform the responsibilities of a member of the board.
- 3) Be willing to contribute financially to ORGANIZATION.

BOARD MEETING ATTENDANCE

- 1) Attendance at all board meetings is expected. (As a working board member, all members need to be in attendance to stay informed and to make decisions.)

It is realized that illness and emergencies may necessitate occasional absences, but to conduct the business of ORGANIZATION, it is crucial that board members make every effort to attend meetings.

- 2) Absence from three (3) regular board meetings, within a fiscal year, for which no sufficient excuse is presented, shall be reason for the director's removal from the board.

TERM OF OFFICE

The term of office shall be for two (2) years. A director appointed to fill a vacancy on the board will serve until the completion of the regular term of the director replaced. A director who leaves the board prior to the conclusion of the term of office must submit a letter of resignation to ORGANIZATION board of directors at least one month prior to the board member's departure.

MEETINGS OF THE BOARD OF DIRECTORS

- 1) Regular meetings occur quarterly at 10:00 a.m. on Saturdays.
- 2) Regular and special meetings of the board of directors consist of quarterly meetings and a biennial planning retreat.
- 3) Notices of regular or special meetings, except when held by unanimous consent of participation, shall be transmitted or mailed to each member of the board not less than five days before any such meeting.

Notice of special meetings shall state the purpose for such meeting.

Notices of regular or special meetings may be given by telephone not less than two (2) days before any such meeting.

- 4) A quorum, consisting of a majority of the board of directors, is necessary to officially conduct the business of ORGANIZATION, and the action of a majority of the directors present at a meeting at which a quorum is present shall be the action of the board of directors except as otherwise provided by the bylaws.

6 STEPS TO ENLIST YOUR DREAM TEAM BOARD

1. Evaluate your current board: capabilities, strengths and weaknesses.
2. Identify **additional skill sets or capabilities** you'd like to add to the board.
3. Identify potential board candidates who fit your profile of desired new board members.
4. Create a nominating or governance committee and empower them to evaluate and enlist new board members. Put trusted, savvy and experienced members on the committee.
5. Give the nominating committee at least a 6-month horizon to enlist new members. They should really be in action all year long.
6. The nominating committee vets potential board members, makes decisions and recommends them to the board.

Evaluate: What Skill Sets Do You Have Now?

It's important to monitor the overall board profile of skill sets, making sure that you have the right people to round out your Dream Team's capabilities.

Many organizations analyze their board membership through various criteria, such as demographic profile, skill sets, diversity, stakeholder representation, and geographic representation.

Use this chart format to analyze your current board.

- What attributes or skill sets are important to your organization?
- Do you track personal qualities such as diversity, region represented, various professional skills?
- Do you want to track level of participation, leadership, track record, teamwork?

Board Member Name	Skill A	Skill B	Skill C	Skill D	Skill E
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					

What Skills Sets Shall You Add?

CHECKLIST: Qualities To Look For In Your Board Members

- Thoughtful
- Connected
- Respected
- Follow-through
- Proven
- Committed
- Responsible
- Influential
- Bring Credibility
- Trustworthy
- Generous
- Motivators
- Can lead by example
- Available time and energy.
- Integrity
- Knowledge of the cause
- Leadership skills
- Peer relationships with other community leaders

My Favorite Skill Sets:

Being the dedicated fundraiser that I am, I focus particularly on **social capital**: what **networks** might a prospective board member bring into our organization?

What fundraising doors can they open?

Who do they know?

What is his or her own personal giving potential?

We need to be sure they also have the **passion and care for our mission**. If they do not, they may bring a clinical and businesslike approach to the work of our board, thus missing the boat.

It is just as important to understand how your potential board members *think* in addition to what they *know* in terms of expertise.

You also might look for other qualities in board members that are harder to determine, such as their leadership skills, are they good team players, can they handle ambiguity, and robust discussions?

▪ Fundraising experience.

I look for experience in fundraising whenever possible, either as volunteers or as professional fundraisers.

People who already know and understand fundraising are invaluable. Their knowledge and expertise helps to back up your own recommendations to the board about smart fundraising strategies.

Why you want people who understand fundraising:

- They'll save you time and energy and even heartache, because they will help set the overall pace of your fundraising.
- They help motivate the rest of the board,
- They set an example for everyone,
- They keep everyone else in line supporting a well-thought-out fundraising plan.
- They will help reign in less-than-productive fundraising strategies.

Boards without prior fundraising experience sometimes drift to easy answers such as “Let’s find 100 people to give us \$1000 each; then it will be easy to reach our goal,” or “Let’s have another event to raise money to fill our deficit.”

We all know that these types of strategies will not raise the money you need; they will distract your board into high-effort, low-outcome activities.

Having board members experienced in successful nonprofit fundraising will keep you from having to be the “naysayer” when a well-meaning but ignorant board member comes up with these ideas.

- **Marketing, sales, and advertising skills.**

We need this because so much of what we do is based on old-fashioned marketing and sales.

Just look at the marketing and sales work you do as a nonprofit leader: you are developing and promoting a “brand” for your organization through its reputation in the community.

Your annual fund and, if you are lucky, your major events also develop their own “brand” image that helps to make them successful or not.

You use public relations skills to “sell” your message to the media and to draw audiences to your performances or create clients for your programs.

Board members who offer valuable marketing and sales skills are not that hard to find. Look for successful real estate agents, bank marketing officers, advertising agency people, salespersons in any field. These folks know how to frame a “pitch” and close a sale.

- **News media.**

I love to have someone who works in the media on my boards. They can offer expert advice on how to define our messages and how to get visibility for special projects and programs.

Not to mention that they can help get the story of our organization in the local newspaper and/or aired on local television.

As nonprofit leaders, we are often too focused our work itself. We neglect our public image and telling our story to the community.

I say that letting the world know about the issues we are tackling and our good work is *just as important* as the work itself.

Raising visibility of the issues helps generate community support overall for the homeless, for ending hunger, for better education, healthcare, environmental protection, or for support for the arts.

In addition to opening doors within the media world, reporters can help you shape your story for maximum impact.

They can tell you how to frame your issue and what angle will be most appealing to the public.

They help you get your organization high on the community's radar screen – and create that all-important background buzz that supports fundraising.

- **Elected Officials.**

I like to pepper my boards with current or retired dignitaries from political life from both sides of the political spectrum.

Retired politicians in particular often play an important role as community leaders. They lend credibility and weight to your board and add their influence in the community to your cause.

Just think about all the supporters who voted for them. These supporters tend to respect the elected official's judgment and will probably pay careful attention to the issues they choose to support.

Being a well-worn realist, I am fine with having an influential politician on your board who may not attend many board meetings or appear as engaged as others.

These individuals can still help you in many ways. Nonprofits need to remember that the government sector can be just as important a funder as the traditional sources of individuals, foundations, and corporations.

Having an elected official on your board is a wonderful way to cultivate that most important funding stream from city, county, state, or national government resources.

- **Business people.**

I like every board I work with to have some members with specialized business skills, including a banker, an investment manager, and an attorney.

We don't want them for extensive *pro bono* services, but to offer an invaluable professional opinion whenever the conversation drifts to matters of finance, accounting, legal issues, and investments.

Of course these categories of board members are typically well connected to people with money—potential donors to our organization!

- **Social and community leaders**

They are, of course, always very important. Having major philanthropists on your board is even better!

If not these individuals, how about a family member or spouse who is just as capable as they are and who also has the same contacts? How about a younger family member who wants to groom him or herself to assume a future role in the community?

What kind of board members do you need for successful fundraising?

Attribute	Description
Experience	<ul style="list-style-type: none"> • Understands fundraising • Experienced with fundraising • Active fundraising experience
Financial Capacity	<ul style="list-style-type: none"> • Need some board members with deep pockets • Each board member willing to make a proud personal annual gift according to their ability
Connections	<ul style="list-style-type: none"> • Has connections to potential donors • Willing to open the door to potential donors • Active and influential in the community
Activities	<ul style="list-style-type: none"> • Attend fundraising events • Take on assignments to help cultivate or solicit • Take thank you assignments • Willing to serve as an ambassador and advocate

Final List: Our Organization Will Seek Board Members with the Following Skill Sets

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

The Process of Recruiting Board Members

You cannot put too much emphasis on the actual *process* of properly selecting board members. It is vital to your nonprofit's ultimate success. As we've discussed, the people you are bringing in must have the talent and passion to be able to run your organization in the future.

Go Slow.

Nominating Committee members should take the slow approach when cultivating potential board members (just as we all should do with potential donors).

One or more committee members should meet a prospect early in the process and tell him that he has been identified by someone already on the board or staff as someone who might possibly be a potential board member.

1. A member of the committee should meet with the person to tell him more about the organization.
2. Tell him you understand he will not make a decision immediately, but you want to take the opportunity to introduce the organization to him and explain the role of the board.
3. Tell him you all would like to get to know him as well, and particularly want to see where his interests are.

Take your time.

It is important to take your time in the enlistment process: If you work slowly and well, you will find that this more deliberate approach to board member enlistment is much more comfortable for everybody.

The people being recruited have time to consider their decision. You have time to get to know them a bit and see if they would fit. When the decision is made for them to join the board, they are familiar with your work and ready to go to work.

Some organizations require candidates to attend a board meeting before they make their decision to join the board.

Be sure the potential board members are willing to be accountable for performance, a minimum donation, and attendance at meetings and events.

Coach your committee members.

Be sure to coach your Governance Committee so that they approach the enlistment effort in a manner both deliberate and enthusiastic. You might even want to hold a special meeting to psyche them up. I call this “getting them grounded in their vision and their plan.”

Always encourage their thinking again about their vision for your organization, and ignite their passion and excitement for its future.

Help them remember the big picture of why they want people to help, so these trustees will be engaging and inspirational as they put Big Requests out there in front of talented board prospects.

Approaching New Board Members: The Wrong Way

Let us assume for the sake of discussion that you or the CEO are approaching a board prospect. You may be shy and nervous about enlisting new board members.

Don't downplay the board member's role.

Do not let yourself start out by apologizing: “It won't take up too much of your time” or “We don't ask a lot of board members,” or, worst of all, “Just your name and contacts would be so very helpful.”

Are you recruiting out of desperation? Do you secretly think that people do not want to serve on your board? Is that a proud, powerful stand to take?

I would not be particularly complimented if I were approached like that. If I sensed a drop of desperation in my recruiter, I would be wary. I do not want to be in the position of doing the organization a favor.

As **Kay Sprinkle Grace** puts it in *Beyond Fundraising*:

Board members recruited in this way seldom develop a level of respect for the organization that leads to commitment. The urgency posed to them in the recruitment process is an urgency to expand the board, rather than the urgency of the community needs their board service helps meet.

The damage compounds when these same individuals are assured, “there is nothing much to serving on the board, don't worry, it won't take much of your time.”¹¹

She is correct. The new board members' commitment and motivation will go downhill from there. They will never be fully invested in your cause.

They will never fully commit to taking action to help your organization. They know they are there merely to fill a seat, and so they are likely to be disinterested and disengaged, almost from the start.

Will people recruited in this fashion tackle fundraising with vigor and courage?

Probably not, unless you can find a way to awaken their passion and vision by linking them personally with your organization's work.

Are you holding your potential board members "small," so to speak? Are you expecting the least possible from them?

Why not approach them from the abundance point of view, expecting that they are likely to be interested, passionate, and committed to your cause?

Approaching New Board Members: the Right Way

If you are the person to approach the conversation with the prospective board member, do so as if you are recruiting a teammate – or approaching a major donor.

You are looking for someone to join your cause who cares as much as you do. It is vital that you share with this person your vision for the organization and your sense of urgency about the work to be done.

Be proud! Be enthusiastic! Be passionate! Just as you do when you are fundraising!

Chances are, the person you are approaching will feel complimented and will be engaged right along with you. Remember, energy is catching!

Your excitement—passionate and committed—will inspire the same feeling in your new board member, and you will have enlisted a new companion for your organization's journey, someone who embraces your organization's cause as you do.

This is the kind of person you need *to be* when you enlist board members, and this is the kind of person you want to enlist.

I will let you in on a secret.

People really want to help each other.

As performance coach Howard Goldman says, people want to be a part of something exciting. People want to contribute. All you have to do is invite them to help and to contribute.

Be sure to tell a potential member *why* she of all people is the person you want for the board. As with a major donor, when you say why only he can make the gift, you should tell your potential board member why you want exactly her, what she brings to the plate, and why only she can be the right board member at the right time for your organization. It's a wonderful compliment to the person you are approaching, and it encourages her to respond positively.

Throughout this process, your stance as a nonprofit leader is crucial. Are you standing in a place of powerful, urgent vision?

Or are you standing in a powerless place where you hold yourself to be less than the people around you?

Here is a secret for helping to enlist the "right" people for your board who will do the work that you describe - evoke their vision.

What do they care deeply about? What brings them meaning and even joy? How do they want to contribute to the common good or to their community?

Inspire them with your own vision that fits into theirs.

Make a "Big Request."

Then make a powerful "Big Request" for their help in achieving something ambitious, something visionary, something powerful for their community or the world.

People, including the busy, important people you really want on your board, tend to respond more to an exciting idea than to any other approach.

They are more apt to join your board if you float out a vision and an opportunity that inspires them to want to be part of the action.

If you are really going to make a serious difference in your community, then inspire them with the possibility of achieving something important.

In fact, one of the country's top performance coaches, Howard Goldman, in his book *Choose What Works*, talks about the power of the Big Request.

"Your power is directly correlated to your ability to make big requests.

The bigger the requests you make, the more dramatic the results you will initiate. . . ."

Board Member Job Description

The formal written job description for board members is an integral tool for helping you get the most out of your board.

It should outline specific duties and expectations, including participating in fundraising.

The job description should spell out clearly your expectation for their time commitment, the policy on board attendance, and the expectation for service on committees and participation in fundraising.

What is the particular job that you might want this individual board member to tackle? Be able to say “this is where we need you!”

Be sure to present your organization’s financial position and its current and long-range plans. Be able to answer that age-old question for any group of people gathered together at any point in time: “What are we trying to accomplish?”

Whatever the expectations are, they must be clear.

An effective board needs standards for member participation in all areas of the organization. Everyone must be clear what needs to be done and when, in order to advance the organization and its work.

Board Member Information Form

Ask your new board member to fill out an information form with all her contact info. In addition, ask for her other affiliations and interests, so you can get an idea of her social networks.

Ask them on this form why she joined the board and what it is about your mission that interests and inspires her the most.

Ask about her skills and experience in: fundraising, events management, letter writing, public speaking, volunteering, sales and marketing, public relations, mailings, strategic planning, corporate board membership, and so on.

This will give you a deeper idea of the range of abilities she can offer your organization.

Wouldn't you rather have a few really committed and passionate people on your board than a lot of disengaged folks?

You want people who will demonstrate a level of leadership and ownership of this organization, and no others.

This is the kind of board that can change the world.

Good luck, and go for it!

