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Finding and Onboarding the Right Board Members

Determining Who the Right Board Members Are: The Skills Matrix

The first thing you'll need to do is to design a skills matrix of the skills most required by your Board (including those that will become more important in the future) and conduct a skills audit of your Board to determine what skillset you need to recruit. You should not default to replacing an outgoing Board member with an exact copy of their skillset. Make sure to critically evaluate what skills your Board needs most urgently. You also need to consider the Board's need for diverse perspectives and experiences.

You may need to recruit new Board members before any existing Board members retire, either due to needing a new skillset or due to timing issues coming down the line. If a majority of the existing Board are due to retire within the same year or two, you need to think about recruiting. New Board members can be brought in on a phased basis to avoid ending up with a Board of entirely new members further down the line.

Keeping Good Candidates Interested: The Recruitment Plan

Great candidates can lose interest due to a slow or uncommunicative recruitment process. Define the timeline and who will be involved in each stage before you begin advertising. This way, you can give a clear deadline when advertising the role and be clear about what the recruitment process will be and when the first round of interviews will take place.

Clarify who has the authority to decide which candidates to call to interview, and how they should do so. This may be a dedicated panel, a Board committee or the entire Board. Similarly, clarify the process for proposing a candidate joins the Board.

One person should be nominated as the lead. They will be the point of contact for any queries about the role and will accept the applications. They should also arrange the interviews, contact any unsuccessful applicants and keep all potential candidates informed of what the next step in the process is and the expected timeline. It is their job to keep the process on track.

Attracting The Right Board Members: The Role Specification

You will need to turn the requirements you decided on above into a clear role specification which outlines essential and desired skills, experience or qualifications. It's important that suitable Board members can look at your requirements and tell that they would be a good fit. Avoid using jargon or acronyms specific to your organisation.

The role specification should be clear about the time commitment (including Board and committee meetings *and* preparation for these meetings), term length and any expenses covered. Outline what training and support is available to new Board members, including what the induction process looks like in your organisation.

Your Board role advertisement is also a sales pitch. You want to show that your organisation does good work, is moving towards an exciting future and is well run. Attaching documents such as recent annual reports or a summary of the current strategy can help to communicate this.

Reaching the Right Board Members: Advertising the role

Beware of using only your own network to recruit new Board members. While the network of your existing Board members, staff and the organisation itself can be a great resource, it should be used in conjunction with other channels.

Boardmatch provides a great service for nonprofits looking to recruit new Board members. Voluntary Board roles can also be advertised through your local volunteer centre. Depending on the role, professional membership bodies can be useful for finding candidates from specific professions. Think creatively about where you might find candidates and where you can advertise the role.

Be clear about the deadline to apply and what information you would like from Board members. It can be helpful to specify a maximum page or word count and let candidates know whether you expect a cover letter. You can help candidates to give you the right information by indicating the criteria, for example:

“Please submit a CV of no more than 2 pages and a cover letter of no more than 1 page outlining your motivation for applying for this role, any previous experience with [nonprofit’s cause] and your [legal/financial/governance etc.] qualifications.”

Selecting The Right Board Members: The Screening Process

As mentioned above, the screening criteria to select interview candidates from the initial applications should be decided from before the point of advertising. A standard set of questions should be developed for each interview and the point of contact should arrange the interviews. The invitations to interview should include the time, date, and place (or video conferencing link) for each interview, details of who the interview panel will be and as much information as possible on the topics which will be covered to help the candidate prepare for a meaningful discussion.

References should be checked for the proposed candidate(s) and, once there is Board approval for their nomination, they can be welcomed to the Board with a formal letter of appointment.

On-Boarding New Board Members: The Induction Process

The on-boarding process should be clearly structured and follow a check-list.

As mentioned above, the first step will be issuing a formal letter of appointment for the Board member to sign, accepting the position and its associated responsibilities.

The next steps will be asking the new Board members to sign other relevant paperwork such as a B10 form to register as a Director of the Company with the CRO, a Trustee Declaration to register as a Trustee on the Charities Regulator’s website and then internal documents such as a code of conduct, conflict of interests policy, confidentiality policy etc. The Company Secretary should ensure the CRO, CRA and RBO are notified of any changes to the composition of the Board and that the organisation’s Registers of Members, Directors and Interests are updated.

The new Board members should be sent a pack of documents including the annual report, strategy, organisational chart, constitution, governance handbook and most recently completed charity governance code compliance form. They should be given access to previous Board minutes and the contact details of other Board members.

The onboarding meeting should be a dedicated session separate to standard Board meetings. It may involve a presentation from other Board members or staff on the organisation itself, its strategy, its finances and how it Board operates. The roles and responsibilities of a Director and a Trustee may be covered by an onboarding session held by the organisation itself or the new Board member may be sent on a relevant training course. It may be necessary to hold more than one onboarding meeting.

New Board members should meet the CEO and the Chair (separately or together) outside of a Board meeting to touch base and introduce each other. Arrange one-to-one meetings for the new Board members and any other key staff members.

A training needs assessment will highlight the areas where a Board member requires additional training.

Be realistic about the timeframe. Induction is a phased 12-month process and new Board members should be overwhelmed with paperwork and meetings as they are finding their feet.

It can be helpful to match new Board members with a “buddy” on the Board so that they have someone to turn to with informal questions. This may be a much more experienced Board member or, it can be equally helpful to have a buddy who was appointed to the Board more recently and has also been through the induction process more recently.

Ask the new Board members for feedback on the recruitment and induction process so that you can improve for next time.

Celebrating New Board Members: Communications

Don’t forget to welcome your new Board members publicly. This can involve adding their bio to your website, posting on social media or including an update in a newsletter to your members.