

# Board Development

## Building Better Boards

Does your organization struggle to find appropriate and committed board members? Do skilled and interested board members feel unable to contribute their best to your organization? Does board recruitment fall at the end of a long list of other jobs that the board needs to do?

Recruiting, developing and retaining appropriate people to serve on boards is a difficult and time consuming job. Healthy organizations recognize this fact, and are willing to make a major investment of time and effort, year-round, to build a strong board. They appoint a Nominating Committee, composed of informed and capable members, to coordinate the building process and give the committee the tools and time required to construct an effective board.

Often the Past President/Past Chair of the board is asked to chair the committee. As a Standing Committee of the board, the Nominating Committee (sometimes called Board Development or Leadership Development Committee) is responsible for identifying prospective board members, cultivating their interest in serving on the board, developing volunteer leadership within the organization, orienting and developing board members, and ensuring that board evaluation occurs. They work closely with the board to recruit the right people for the job ahead. The qualities they are looking for will vary from year to year, depending upon the skills of the remaining board members and the future plans for the organization.

An effective board committed to a purpose, and skilled in planning and resource development may be the greatest asset of an organization. While dedicated and talented staff and/or front-line volunteers are also a critical part of the team, their time and energy would be wasted without the time, focus, direction, and resources that a board provides. Take the time to build a solid foundation for your organization by developing a board development plan. Then you can relax and be assured that the best people available to serve on your board have been given the opportunity to do so.

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## Board Development: **Building Better Boards**

### **Benefits of Being a Board Member**

*Take the time to identify the benefits of being a board member in your organization. Spend 20 minutes at the beginning of the next meeting, or explore this topic in more depth at a retreat. Ask your existing board members to answer the following questions:*

- *What attracted you to become a member of the board?*
- *What do you find most rewarding about your role in this organization?*
- *How can the board make board roles more attractive to both current and prospective board members?*

*Record the answers on a flip chart or a white board so that the answers can be shared. Large group discussion may encourage more ideas. If your board is less outgoing, consider doing the exercise privately.*

*This activity may also be useful for reinforcing the positive aspects of your board, and for identifying improvements that may encourage greater commitment from existing members.*

*Adapted from: Hutchison, Bonnie. How to be a Winning Board. Edmonton, Alberta: Alberta Association of Rehabilitation Centres, 1984.*

## **Why Board Members Say Yes**

Successful board recruiters can identify and communicate the benefits, as well as the responsibilities, of the job. Consider the possible needs of prospective board members, and both the concrete and the less tangible benefits that your organization can offer.

Board members are asked to commit time and skills to govern, and sometimes to manage, the organization. The question that you need to answer is, “What satisfaction can prospective board members hope to receive, in return for their commitment, from our organization?”

To recruit successfully and retain board volunteers, your organization must understand what motivates prospective board members. Each prospective board member is unique. He or she may choose to join your board for a variety of reasons. Some of the reasons are publicly stated, and other reasons are more subtle. Most board members do not receive remuneration, so you must identify other benefits that might impact prospective board members. You will be more successful in recruiting if you consider the principle of fair exchange between your organization and its board members.

Benefits might include:

- Opportunities to contribute to the welfare of the community
- Effective use of the board member’s skills and time
- Convenient meeting schedule
- Networking possibilities

Choosing a place to contribute significant amounts of time and energy is much like making a major purchase. Customers will look at a retail outlet with a good reputation and customer service. They may consult friends and family for ideas. Besides offering appropriate “benefits”, make sure your organization has an image that encourages your customer, the prospective board member. No matter how much good your organization does, customers also need opportunities to see what you sell to sample it, and to “buy” a rewarding volunteer experience at a fair price. What does your board have to offer?

# Invest in New Board Members

Wise employers recognize that time invested in the orientation and training of a new employee is a sound investment. The new employee is ready to be productive and up to speed that much sooner. The same principle holds true for new board members. Regardless of their experience and skills, new board members want to know the mission and purpose of their new organization. To get them involved as soon as possible they need to know the major activities and issues of the organization.

Many new board members already have a base of information and experience. Opportunities like group orientation and ongoing training are ways for new board members to share this expertise. Well planned and effective board training allows all board members to make decisions and to take action from the same base of information.

To contribute in a meaningful way to the board and organization, new board members need relevant information that meets their time and learning needs. Utilizing a variety of methods to orient board members increases interest and enthusiasm. Some suggestions are:

## ***Group Orientation Session***

- Generally held within first month of term
- Includes all board members
- In the format of presentations, discussions, or tours

## ***Board Orientation Manual***

- In a user-friendly format
- In a three ring regularly updated binder
- One copy for each board member

## ***Mentors***

- Partner new board members with willing and experienced board members

## ***Three Month Check-up***

- Board chair monitors each board member's comfort and concerns
- Periodic meetings are set to discuss with board member how things are going

Ongoing investment in individual and group training develops new board members. It also helps new board members and the whole board work more effectively and cohesively sooner.

## **Board Development: Building Better Boards**

### **Board Orientation Manual**

1. *Table of Contents*
2. *Mission Statement*
  - values & beliefs
3. *History/Background*
  - minutes, annual report & audit reports
  - brochures, promotional materials
4. *Board Structure and Operations*
  - meeting dates, times, locations
  - board & committee structure
  - board agenda format
  - board member job description
5. *Bylaws*
  - objects & bylaws
6. *Policy Manual*
  - current policies
  - long term strategies
7. *Financial Summary*
  - annual budget
  - insurance
  - summary of funding sources & holdings
8. *Board Committees*
  - Each committee's terms of reference, year-end reports, goals & objectives for current year
9. *Board List*
  - Names, position, length of service, addresses & phone numbers, biographies

## Board Development: Building Better Boards

*“How we recruit and develop board members, by identifying, interesting, involving and inspiring individuals, has a great deal to do with whether members serve or sit.”*

*“Businesses have their recruiters and search firms, and professional sports teams have their scouts; for us it’s the Nominating Committee.”*

Brian O’Connell



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## Board Training Pays Off

Today’s employer keeps up with emerging trends by committing resources to staff for professional development. As board members gain experience and face new challenges, training for individuals, as well as the board, often increases effectiveness and interest. This creates a group of board members with a high degree of commitment to the organization.

Training activities could include:

**Information sessions at board meetings** - Hold short information sessions before or after meetings to liven up board meetings, as well as creating effective learning opportunities. Facilitate these sessions with board members, staff or outside resource people.

**Inservice training and workshops** - Schedule special sessions for topics needing more in-depth treatment. Conduct a needs assessment to make sure format, content, process, time and location are appropriate.

**Retreats** - Give more time for discussion, to plan for the future, to explore new ideas, and to get to know each other. Can be a whole weekend or a mini-retreat of one day.

**External workshops and conferences** - Provide board members with external workshops related to their board role. Commit funds to attend or try to find a foundation or corporate sponsor who offers bursaries.

**Books, audiovisual materials, and electronic resources** - Make certain that print and electronic resources, books, magazines, resource lists, both within organization, and in specialized resource centres, are available.

**Distance education** - Investigate teleconferences, self-directed learning resources and other methods of development to assist board members who may be geographically isolated.

A variety of experiences provide the challenges and development opportunities many board members need to sustain their involvement.

### Something to Think About

#### Cultivating Prospective Board Members

Development of new board members usually starts years before the person is willing or able to serve on your board. Like professional athletes or gifted musicians, board members develop leadership skills and an interest in your cause over a long period. How can you prepare them or help influence their choice to serve your group?

1. Keep them informed about the organization’s aspirations and work. They must understand and value your goals before they are likely to commit to a board role.
2. Strengthen their interest through personal contact and introduce them to like-minded people within your organization.
3. Involve them in progressively responsible volunteer leadership roles, appropriate to their needs and abilities.