



Project READ Literacy Network

Recruiting & Orienting Board Members

Research & Best Practices Report



July 2024

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Research & Best Practices

Table of Contents:

| | |
|---|----|
| Introduction..... | 3 |
| Best practices..... | 4 |
| Board Member Recruitment Ideas..... | 4 |
| Board Member Orientation Ideas..... | 5 |
| Board Member Annual Orientation Review Ideas..... | 6 |
| Checklists..... | 7 |
| Board Member Recruitment Checklist..... | 7 |
| Board Member Orientation Checklist..... | 9 |
| Sources:..... | 10 |

Introduction

This document outlines key considerations, best practices and checklists for implementing recruitment, orientation, and orientation review processes for new and existing Board Members.

This information was gathered through research and consultation with existing Board Members of Project READ in 2023-2024. The group focused on answering the following question:

- How should we proceed with recruiting, orientating, and annual orientation review of Board Members?
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Best practices

Board Member Recruitment Ideas

- Idea - review and compare existing recruitment processes, videos and job posting against the recruitment checklist:
 - What is covered, what is missing?
 - Are past member testimonials included to see and hear the voice and emotion of the agency?
- Idea - create a referral program:
 - Offer incentives for employees/Board Members to recruit (prizes, rewards, etc.)
- Idea - leverage social media and online presence:
 - Advertise through all social and employment networking platforms.
 - Add/enable a chat box to the agency website and social platforms for people to ask questions and engage.
- Idea - offer internship and student positions to join the board:
 - Reach out to schools and community groups as an opportunity to show students what the agency does and get them interested.
- Idea - make the board more visible:
 - Include pictures of the members, list names on the agency website, annual reports, other external communications, etc.
 - Create additional supporting recruitment resources such as:
 1. Interview (video) with existing board members to tell the story of connection to LBS, to being on the Board, and what they get from the experience
 2. Interview (video) community partners/stakeholders to tell the story of connection to LBS and what gets them excited about working the agency
- Idea - focus on recruitment regularly, not just when the hiring period comes:
 - reach out to qualified prospects.
 - keep this active throughout the year on social media.
 - Consider promoting on “LinkedIn” Recruiter
 1. A hiring platform to quickly find, connect with, and manage candidates.
 2. Access professional insights, personalized messages to engage candidates, and analytical tools to manage your candidate pipeline.
 - Consider promoting on “Indeed” as unpaid job opportunities
 - Ideas for messaging to demonstrate excitement
 1. “Join the Board of Directors > Be the boss and gain leadership experience!”
- Idea - aim for EDI (equity, diversity, inclusion):
 - Diversity of perspectives, backgrounds, experiences, education, etc. is an asset
- Idea - invite potential Board Members to an organizational event to meet other members and staff in person or virtually.

Board Member Orientation Ideas

- Idea - **Create and share video(s)** to help Board Members to see the faces and hear the voices of the people they will be working with/alongside
 - Videos ensure that information is shared consistently with new Board Members
 - Orientation (Video) should tell candidates about the orientation materials and how to access them
 - Orientation (Video) should be shared with new Board Members once they have been voted onto the board (before their orientation meeting to get them engaged quickly and help them prepare for the meeting)
 - Ideas from eLearning Industry - for videos:
 1. Add captions and a voice over
 2. Make it interactive
 3. Allow on multiple devices
- Idea - **Gather feedback from current Board Members** to update and maintain orientation process:
 - Ask if they think their original orientation was lacking in information in any area so this can be adjusted for the orientation of new Board Members.
- Idea - **Create/share a Board Member Bio book** (personal bios written by board members and a picture (not headshot) to build connection among board members.
- Ideas for **Orientation process**:
 - Breakdown the Orientation materials into smaller pieces to make it more consumable and easier for new members to digest:
 1. Start with a **welcome call/email** from the ED and schedule 1 hr orientation meeting:
 - highlight that and intro email will be shared soon.
 2. **Email** at least one (1) week before the orientation meeting:
 - highlight gratitude for their leadership and include any light reading materials to review/prepare for the orientation meeting.
 3. Host **1 hr Orientation meeting** with ED, Board Executive and senior staff (optional), ideally right before a board meeting:
 - include introductions, inspirational story, brief history, summary of programs and impact, financial position, and intro to board meetings content and expectations.
 4. In the **first Board meeting with a new Board Member**, engage them:
 - Begin with an exercise that gives the group an opportunity to know each other and what they value.
 - The chair/president should invite the new member to share their perspective when opportunities arise, and let them know they are not expected to contribute to everything as they are just getting started.
 5. **Follow-up** with a thank you email to the new Board Member and include next meeting date, links to relevant materials, invitation to join sub-committees or schedule another meeting to discuss

Board Member Annual Orientation Review Ideas

- Idea - Gather feedback from current Board Members
 - ask them where they think they are lacking in information so we can include that in the review
- Idea - rewards for coming back?
- Idea - exit interviews?

Checklists

Board Member Recruitment Checklist

- Invest in making your organization more visible in the community
 - Treat your recruitment effort as an opportunity to promote the importance of what your organization does or the difference it makes in people's lives. The benefits of being on the board will include the opportunity it provides for someone to contribute to his/her community.
- Make your board and its job more visible
 - When you talk about your organization, include your board in the picture.
- Be clear about the role of the board, what you expect of Board Members and what they should expect of the organization
 - Communicate what new Board Members can expect in terms of orientation, mentoring, meeting notices and reports
- Know what you are looking for in new Board Members
 - Discuss what kinds of additions would make for a stronger and more dynamic board from an external (membership or stakeholder) and internal (board and staff) perspective
- Do not hide your current challenges
 - Tell prospective Board Members, and those helping you identify candidates, about the challenges the organization faces, financial and otherwise, not just its past accomplishments and strengths.
 - Give them some sense of your history, what the organization has been through and what it is going through.
 - Speak to them about the strategic issues for the organization and the organization's long and short term objectives.
- Look far and wide for board candidates
 - Recruit with a three year perspective. Approach people you want even if you suspect they are not interested now - they could be interested next year or perhaps the year after that.
 - Assume that there are lots of people interested in the work of your organization that are not known to you.
 - Do not exclude anyone you are interested in from being on the list
- Recruit with style
 - Develop a **recruitment package** containing:
 1. the mission of the organization,
 2. a short history and description of what you do,
 3. a Board Member's job description,
 4. the list of current Board Members,
 5. the executive summary of your strategic plan,
 6. and something to show excitement and why we need them on our Board (include link to recruitment video if available)

7. AGM Report

- Know before you approach them what it is about the person the board wants and your organization needs.
 - Try a three-step approach: ask if they would consider serving, if you can give them a recruitment package and then follow-up in a week. If they say no, ask if they would mind if you asked them again next year.
 - Contact prospects initially by paying them a visit, making a telephone call, or sending an e-mail
 - Invite prospective Board Members to a board meeting.
 - Consider a formal application and interview process to underscore the importance of the decision for both the board and the candidate.
- Make recruitment a team building effort
- Add recruitment as part of every Board Member's job description
 - Set recruitment goals and timelines.
- Focus on recruitment regularly
- Put board recruitment on the agenda throughout the year – at least quarterly.
 - Set up a standing board recruitment committee.
 - Maintain a board prospects list.

Board Member Orientation Checklist

- General expectations of Board Members (General Director Job Description):**
 - Know the organization's mission, goals, policies, programs, services, strengths, and needs.
 - Understand the organization's financial statements and otherwise help the board fulfill its fiduciary responsibilities.
 - Prepare for and participate in board and committee meetings.
 - Attend all board meetings and come prepared to participate.
- Program presentation by ED, video, or key staff
 - Share website, annual calendar, publications and programs list.
- History:
 - Give a brief overview of the history of the organization.
- Strategic Direction:
 - Review strategic plan.
- Finances:
 - Review financial processes.
 - Provide an overview of the budget practices Board Members will need to know
 - What to know to approve organizational budgets, how to read a financial statement, etc.
- Organizational Structure:
 - Review bylaws.
 - Review organizational chart.
 - Introduce key staff members.
 - Make sure Board Members not only understand how the organization is structured and how the board interacts with specific staff members.
- Create, update, maintain and share Board Roles, Job Descriptions & Individual Board Member Responsibilities:
 - Roles of the Board President vs individual Board Members.
 - Roles of the Secretary/Treasurer, Vice President, Meeting Chair, Committee chair.
 - Fundraising responsibilities.
 - Roles that advocacy plays in mission achievement, and how Board Members can stand for their missions.
 - Materials to share with new Board Members:
 - Letter of agreement, conflict of interest policy, board roster, Board Member description, recent board minutes
- Board Operations
 - Review board manual
 - Meet with board chair
 - Accept committee or task force assignment
 - Schedule of board meetings, schedules of committee meetings, full board roster and committee rosters

Sources:

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