

Recruiting: Setting a Strategy

Learn how to use your Members Report to conduct an inventory of your board, set a clear recruiting strategy, and follow good process to gain appropriate alignment.

Finding great board members starts with knowing what you're looking for.

You're more apt to find high-quality candidates if you can clearly articulate exactly what you're looking for in a new trustee.

How do you build an explicit, prioritized, ideal candidate list?

Ideally, your board has a Governance Committee. This committee is tasked with finding and recruiting new trustees, organizing board education, providing new trustee orientation, and focusing on the overall health and functioning of the board.

The Governance Committee should meet and review the Members Report in detail in order to create a prioritized list of board expansion needs.

As a team, you'll answer these questions:

1. What are our goals? What does the board need to accomplish in the next 1 - 3 years?
2. What skills and expertise are needed to make that happen?
3. How many trustees will we need to achieve what we've set out to do?
4. Is our board demographically diverse? Does it reflect the community?
5. How will term limits and succession planning impact our recruiting needs?

When you answer those key questions, you'll position yourself to recruit strategically. And, you'll protect yourself from some of the biggest recruiting mistakes we see people make.

Too often, people go for the path of least resistance. You recruit the friends and family who believe in your mission. You get stuck in your known circles and have a hard time breaking out.

But, the board is the strategic partner the CEO relies on to deliver on the charter's promises. They must be a strategically assembled group of highly effective leaders who bring the skills, expertise, temperament, and time to govern a multimillion-dollar public enterprise. They're not simply a group of well-meaning volunteers.

Here's how to answer those key questions the right way.

1. What are our goals? What does the board need to accomplish in the next 1 - 3 years?

What are the most important things your board will do to add value to the organization this year? What about over the next 3 years?

If form follows function, who do you need on your governance team to achieve these goals? Where are the gaps?

If you haven't set your board's goals, do that first. Come back to your recruiting plan once you know what you're recruiting people to do.

Create your goals and manage them in the **BoardOnTrack** goals dashboard.

2. What skills and expertise are needed to achieve our goals?

Make sure your board contains the skills and expertise that every charter board needs. And, your board's skills will complement the staff's skills and bring a depth of expertise that the staff might never have.

Where do your skills match the **BoardOnTrack** recommendations, and where do they differ? How do you want to strategically approach this? Where are your biggest risks?

Based on your goals, you might need special skill sets. For instance, if you're launching a major initiative like buying a new building, you'll need more people with the right facilities and financing skills to make that happen.

Having more than one person with each of the skills you need is key to building a strong board. It builds a deep enough bench to support succession planning. Where do you need to build bench strength?

Use the Members Report to inventory your board's skills and gaps

3. How many trustees will we need to achieve what we've set out to do?

If your board is much smaller than the ideal size that BoardOnTrack recommends, ask yourselves: Do we understand the rationale for the recommendation? Are we ready to move to a larger board doing substantive work in between board meetings? How important are functioning committees in achieving our strategic priorities?

4. Is our board demographically diverse? Does it reflect the community?

What does the Members Report tell you about the current levels of diversity on your board?

5. How will term limits and succession planning impact our recruiting needs?

When a trustee's term expires, they don't just leave the board. They take their skills, personality, and experiences with them. It's essential to track trustee skills and demographics as they relate to trustee terms, so the governance committee can help the board be strategic when it plans for board expansion.

As trustees rotate off the board, will current trustees be able to fill those gaps? Or will you need to recruit others with these same skills?

And on a related note: how urgent is succession planning for you -- where board members in general are concerned, or for board officers?

Keep track of which skills you've got on your board, and which you need to fill.

As your organization grows, your board will grow alongside it. And it'll continue to be even more important to have *enough of* the right people in the right roles, doing the right work.

You'll need to keep a close eye on what skills you need today, and what skills your organization will need in its trustees in the future.

This means knowing who's on the board, whose terms will be coming to an end, how many new seats you'll need to fill along with new people you'll need to recruit.

This can be a lot to manage. It's why we built a three-year recruiting roadmap into the **BoardOnTrack** platform.

FY19-20: Reporting on 10 people. 1 has not completed their skill survey. [Details](#)

GROUP BY:

YEAR



Click for details report, to see who's included in the report for that date range

SKILLS SUMMARY	CURRENT FY19-20	FY20-21	FY21-22	FY22-23
Academic Excellence				
Development				
Facilities				
Finance				
Governance				
Human Resources				
Key Qualities				

Sufficient Expertise Minimal Expertise Insufficient Expertise Insufficient Data

DEMOGRAPHICS	CURRENT FY19-20	FY20-21	FY21-22	FY22-23
Age				
Gender				
Ethnicity				

Your Members Report pulls all of your trustee's skills & demographics data together for you. Thus, you always have at-a-glance visibility into what skills are represented on your board today *and* how that'll change over the next three years.

Shortcut: You can find your Members Report in both the *Team* and *Report* sections in **BoardOnTrack**.