



# **Tips for Finding and Recruiting Exceptional Board Members**

A great deal of the success of your organization is dependent upon building a strong board. If you carefully and strategically assemble a strong team with relevant and complementary skills, a diversity of life experiences and training, an ability to work well as of part of a group, a willingness to devote substantial time to the organization, all combined with a passionate belief in your organization's mission, you will have a strong team capable of delivering effective solutions for the challenging issues of governing a public charter school. But, if you add trustees to your board without carefully delving into their backgrounds, skills, personality, and motivations, you may end up with a board unable to govern effectively.



## Finding Great Board Members

You are more apt to find high quality candidates if you can clearly articulate to your board, contacts, and supporters exactly what you are looking for in a new trustee. Once you have an explicit, prioritized, ideal-candidate list, you can begin searching for suitable potential trustees.

### Sources for Board Candidates and Referrals

With your prioritized list, reach out to current and past board members and ask who they know that might fit the skills, qualities, and diversity you need. Initially, you'll want to develop as broad a list of potential candidates as possible.

Too often, when faced with the need to expand their board, governance committees jump to thinking solely of lists of candidates, rather than also listing potential referral sources. Don't just ask, "Who do we know who fits these criteria?" Though making an initial list of candidates is good, the wider the net you cast, the more likely you are to build a strong, diverse board.

You want to avoid only recruiting candidates from a small inner circle of people.

Referral sources are:

- People too close to you or to the school to be effective on the board
- Great connectors
- People that you know are too busy for your board but would still like to help

Remember that the trustees represent the public in overseeing the public charter school. So, in addition to developing a list of candidates, you should also develop a list of *referral sources*.

Referral sources themselves will probably not be viable board candidates, but they will be able to refer you to suitable candidates outside of your usual contact lists.

Examples of referral sources:

- Teachers at your school--you might be amazed at their connections
- Local politicians supportive of your mission
- The executive director of a local nonprofit that you admire
- Local college and university presidents
- Chair of the local Chamber of Commerce board
- Your current donors; foundations are connected, seek their advice
- Affinity groups, such as the local chapter of Hispanic MBAs, or the local chapter of the Association of Fundraising Professionals, etc.
- Anyone you know to be a great connector!

### Cold-Calling

If you need someone with a specific skill for which you do not have any concrete leads, or if you need to break out of a board recruitment rut, some targeted cold calling may help. Great places to cold call, if you feel you've run out of leads:

- Closest office of the big management consulting firms (Bain, McKinsey, etc.)
- Specific areas of expertise at local corporations (e.g. the heads of HR, marketing, finance, PR or other departments)
- Law firms and accounting firms

### How to get the most out of referral sources and cold calls

Don't waste their time, and don't give them an easy "out." Be as specific as possible about what you are looking for. Clearly articulate the skills, qualities, diversity, and *time* required of the candidate.

- Remember, every time you reach out to a referral source, you are representing your organization. Be organized and be prompt with follow through.
- Have written materials that can easily be circulated online. Make sure to include basic information about the school, a link to your website as well as a job description and performance expectations for trustees

### Speaking Engagements

Education reform and charter schools are hot topics, and many people want to discuss and debate these issues. Offer to speak at a luncheon of one of the affinity groups mentioned above, about charters in general and your school specifically. Then, pitch people to get involved! This is not only a great way to find board members, but to find potential donors and volunteers as well.

### Advertising for Board Candidates

Many charter schools have had surprisingly good luck advertising for board candidates. There are several websites devoted to helping organizations find board candidates such as BoardNet USA or local United Ways. In addition, college alumni networks and various affinity groups are good places to start.

Where to advertise candidates?

- BoardNet USA [www.boardnetusa.org](http://www.boardnetusa.org)
- Idealist [www.idealists.org](http://www.idealists.org)
- VolunteerMatch [www.volunteermatch.org](http://www.volunteermatch.org)
- Local United Way Board Banks and Annual United Way Board Matchmaking Fairs
- LinkedIn
- Facebook
- College alumni networks
- Local chapters of affinity groups/professional groups, for example:
  - Chicago Chapter of Hispanic MBAs
  - Massachusetts Bar Association's Black Lawyers Association
  - Local Chapter of Returned Peace Corps Volunteers
  - Local Chapter of Association of Fundraising Professionals
  - NAACP

## The Dos and Don'ts of Advertising

- Be as specific as possible. Mention the skills you need, *the time requirement*, and other qualities
- Use a phrase like “seeking board members, committee members, and other volunteers” to give you an out if someone isn't a good fit for the board

## Luring Them In

Get potential trustees to the school!

It's very hard to say “no” when you see a school in action. Remember, the average person you are courting may have never been in a public school in your neighborhood, or it may have been a very long time ago.

Often, a great time to meet with a candidate is first thing in the morning, when they are on their way to work. If it's hard to set up the first meeting, you may have to go to them first. In addition, have them attend a board meeting or meet with one of your board members.

**Caution:** *It should be mandatory that a potential board member visit the school at least once before they are nominated for the board. If they are too busy to visit the school, they will most likely be too busy to be an active board member.*

## Choosing Board Members

Don't just “sell.” Do some listening too, and make sure the candidate is a good fit, especially for *mission* and *time*.

Explicitly ask if the candidate is prepared to use the skill you are recruiting them for. Some people find it easy and natural to use the skills they employ all day (e.g. accounting) when they volunteer, but others are looking to do something totally different when they volunteer. (“Use my accounting skills? No thanks, I do that all day. I was joining this board so I could learn more about curriculum design.”)

Have more than one person meet with each candidate and test for mission/culture fit.

Develop some key questions to ask to probe their motivations, etc.

Explicitly go through the job description with them. Make sure that they can fulfill each and every responsibility and that they have the time to commit.

If you are exploring the candidacy of several board members, ask each of them the same questions in order for you to compare and contrast them with one another. In addition, this will ensure that the process is fair and equitable. Also, it's often extremely helpful to develop a quantifiable rubric to help you objectively compare candidates.

## What if the candidate isn't a perfect fit?

*Don't take them.* If you are unsure of a candidate, start him or her on a committee, measure their performance, and then move them up to the board. It is recommended that your committees have non-board members on them. This is a great way to build a pipeline of potential board talent. Some boards even require a mandatory service time of a six months or a year on a committee before becoming a full board member.

## What if they can't make the time commitment?

If they meet all of your other criteria but simply don't have the time to serve on the board, find other ways for them to help. Maybe they could work on a short-term project? Or serve on a committee?



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# ABC Charter School

## Board Candidate Evaluation Form

Candidate Name: _____	Date: _____
Evaluator Name: _____	

### 1. Relevant Expertise:

Does the candidate have expertise relevant to a board position? Will his or her expertise fill a need unmet by current board members? Has the candidate had enough experience within his/her field such that s/he can make meaningful contributions? Is the candidate willing to share his or her expertise as a board member?

*Please check only the TWO most relevant areas of expertise:*

- |   |  |
|---|--|
| <input type="checkbox"/> Strategic planning             | <input type="checkbox"/> Governance                          |
| <input type="checkbox"/> Senior management/leadership   | <input type="checkbox"/> Facilities/Real Estate              |
| <input type="checkbox"/> Accounting/finance Fundraising | <input type="checkbox"/> Education                           |
| <input type="checkbox"/> Legal                          | <input type="checkbox"/> Politics/ Connections               |
| <input type="checkbox"/> Marketing/PR                   | <input type="checkbox"/> Community Representation/Organizing |

Definitely Reject	Probably Reject	Unsure	Probably Invite	Definitely Invite
<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>

### 2. Teamwork:

Will the candidate make a good team member? Is the candidate open to hearing others' opinions and perspectives? Sensitive to group dynamics? Willing to put organizational needs before his or her interests and needs in making decisions?

Definitely Reject	Probably Reject	Unsure	Probably Invite	Definitely Invite
<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>

### 3. Commitment:

Is the candidate willing to devote her/his full energy and talent to the board? Is the candidate's understanding of his or her responsibilities as a board member aligned with our expectations? Does he or she have the time necessary to be an active board member? Even in the face of organizational challenges and difficulties, will the candidate remain committed to the organization?

Definitely Reject	Probably Reject	Unsure	Probably Invite	Definitely Invite
<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>

### 4. Philosophical Alignment:

Does the candidate believe in the mission and purpose of both our organization and the charter school movement? Will the candidate make decisions based on alignment with the organizational mission, rather than based on personal needs and considerations?

Definitely Reject	Probably Reject	Unsure	Probably Invite	Definitely Invite
<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>

**TOTAL SCORE (out of 20):**

### Overall Impressions:

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## SAMPLE:

# Board Candidate Interview Questions

Below is a list of questions to consider asking potential board candidates. Select several questions from each of the four categories. Try to ask each candidate the same questions.

### Skills and Expertise:

- What is your past governance experience? Do you believe the board you served on was effective? Why or why not?
- Where are you from? Neighborhood, school, personal story.
- What work do you do right now? How might this work support the mission of this school?
- Why might you want to support this school? What unique contribution will you bring?
- What ideas if any do you have to leverage your networks and connections that could benefit the school?
- How might you advocate for the school publicly and privately?
- What would you do if the media or some local groups opposed the school?
- Do you have any past issues or conflict of interests that could potentially interfere with your service on the board?
- Describe a project that you raised money for in the past. What were your goals and what was the outcome?
- What do you see yourself bringing to this board?
- What do you hope to get out of being on this board?

### Teamwork and Group Participation:

- What are the characteristics of effective groups?
- What qualities make some boards more effective than others?
- What do you see as the role of the ideal board member? [Look for volunteerism and appropriate understanding of governance]
- When you are in a professional group, do you often change your mind on an issue about which you feel strongly? Can you think of any examples when this did or didn't happen?
- If your personal views were to come into conflict with a decision of the board, what would you do?
- Would you be willing to make a financial contribution that was meaningful to you and the school if you were a member of the board?
- Describe an experience in which you had leadership responsibilities with a group. What worked? What did you learn about yourself?
- Describe your ideal approach to resolving conflict.
- Describe a situation in which you had a conflict with a team member, employee, or manager. What strategies did you use to resolve the conflict?
- Working on a board requires close teamwork amongst a group that is likely to bring diverse backgrounds and experiences. Can you describe an experience in which you worked with such a team? If not, how does this opportunity strike you?

## Time and Energy:

- What projects are you passionately committed to right now?
- What is your current work? How is it going? What do you like and dislike about it?
- Are you willing and able to commit at least ten hours a month to a cause you feel passionately about? Can you think of a recent example where you did this?
- Do you have any other non-profit commitments that might be a higher priority than your work on this board? If so, what are they?
- How many board positions do you currently hold? What conflicts would your service to this board present?

## Philosophical Alignment:

- What does the ideal middle school look like?
- Where do your children go to school? Are you satisfied? Why or why not?
- What is right/wrong with education right now?
- What would you never want to see in this school?
- What is a charter school?
- What do you like and dislike about the charter school idea?
- Do you think that we should hold children from poor urban backgrounds to college preparatory academic standards? What about students who have moderate disabilities?
- What do you believe about charter schools? Do you think they are good or bad for public education and the children they serve?
- Do you think public schools should be in the business of teaching character and civic education?
- Do you think that urban middle-school students should be required to wear uniforms and be expected to learn in a highly structured and disciplined environment?
- What is the primary purpose of public schools?
- Describe your vision of an excellent public school?
- Why do you think so many inner city kids are not succeeding academically? What is needed to address these causes?
- Tell me about an experience or achievement from your own schooling that was particularly powerful for you?
- For our school, ten years from now, how would we know if it had been successful? What kind of measurable or appreciable results might we see that would have us know we had succeeded?



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for more information