

## HOW TO BUILD A SUCCESSFUL, DIVERSE, MOTIVATED BOARD: A SHORT PRIMER

### 1) Define what your organization needs a board for

- What are the functions that your organization needs a group that's "inside yet not wrapped up in the day-to-day" to perform?
- Don't forget about oversight of mission/programs, finances, fundraising, governance – but don't stop there. Do you need your board to provide an HR backstop? Marketing savvy? Legal expertise? What else?
- Do you need a working board, or a "contacts" board, or a bit of both?
- Talk to people on other boards to get out-of-the-box ideas that might work for you.

### 2) Given the functions you've just listed, decide what kind of people you need on your board to make sure the board can carry out its charge

- What communities do you need access to, and what communities need to have their voice heard in determining the direction of your organization's work?
- What expertise do you need access to, and what types of skills and services?
- What kind of demographic diversity do you need to appropriately represent your community while enabling you to reach out beyond it as well?
- What kinds of contacts do you need on your board?
- Do you need people with time? What kind of time?
- Note: Some boards have geographic or demographic restrictions, or are limited to constituent members – in that case some of these functions will need to be carried out by an advisory board.

### 3) Develop a profile of what your ideal board would look like, and measure your current board against it to determine the gaps

- No-one has a perfect board, and once you can clearly see the holes, you can start to recruit to fill them.
- Rank the areas your board is missing, and prioritize them in order of urgency. Could you fill some of these holes through judicious use of informal advisors, at least for now?
- Try to combine a variety of needs into one profile, such as "Female Latino Corporate Lawyer with Financial Expertise." That makes it easier to look for someone who meets those criteria – and easier to sell them on the fact that they're your dream candidate once you find them.

### 4) Define the responsibilities of individual board members so you can be clear about what you expect from people as you speak to them about possible board service.

- This involves items like how many board meetings everyone is expected to attend; whether there's a minimum gift requirement, and how much time they are expected to expend.
- Involve your board members in setting these parameters so they are mutually accountable to each other.
- Use these standards as the basis for term renewal conversations.

### 5) Use your entire board as your search team in identifying board prospects

- Send everyone out with a profile and regularly ask for progress so people don't forget.
- Develop "courting" structures through which you can try out potential board members – like event committees, advisory task forces – and they can audition you as well.
- Try to have the ask come from a board member, to build in board-to-board loyalty and accountability.

### 6) Build in sufficient on-boarding structures to cover the new members' entire first year

- Set the new member up with a board buddy who can go over the "back story" off-line.
- Make sure there's social time so the new board members can meet – and bond – with the remaining members.

- Give the new board member something to do right away, and make sure it's something they can succeed in.
- Make sure the new member – and your old ones too, for that matter – have sufficient exposure to the programs so they fall – and re-fall – in love.
- Board service is hard enough if you take it seriously, that there needs to be a reward – and the best reward is to know you're part of a larger cause that's changing the world, one day at a time.