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Steps of an Effective Recruiting Process

Overview

A strong board begins with the right board member composition. Charter school boards need the right mix of people who bring the skills, perspectives, experiences, and networks the board needs to achieve its goals. Effective boards build a deliberate and strategic recruiting process to maintain a balanced board composition. Here are some steps to help you get started.

1. Build a strong governance committee

Governance committees are responsible for designing and running a board member recruiting process. (See Education Board Partners' (EBP) tool, Governance Committee Charge.) Governance committees drive the recruiting process, assess board needs in relation to goals, inventory current composition, and recruit and interview new members to the board. When the governance committee is weak, the entire process deteriorates leaving candidates disenchanted and boards unable to effectively recruit. Make sure this committee knows its duties and is fully "staffed" with board members. Recruiting talented board members is a process that requires a significant investment of time, and should not be left to a committee of one individual.

Governance committees should document the board's recruiting process that includes the components below. Share this process with the full board so that they are prepared to play their role in securing high-performing board members.

2. Create/review key recruiting documents and interview process

Before the board launches the recruiting process, it is critical to prepare. Boards need to share key information with candidates such as a Board Member Agreement and Bylaws in the interview process. Approaching candidates prepared with this information demonstrates that the board is organized, efficient, and transparent. See EBP's tool, Selecting New Board Members: Suggestions for a Strategic Interview Process for more detail.

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3. Determine the board composition needed to achieve the board's goals over the next three years

Board member recruitment should be directly aligned with the school's strategic plan and goals (See EBP's tools on Strategic Planning and Goal Setting.) Your board will need different kinds of people on it depending on what you are trying to achieve.

For example, if your school needs to acquire a new building in three years because the strategic plan articulates plans for expansion, incorporate that goal into your recruiting plan. Consider what kind of real estate expertise you need on the board (e.g., finance, law, construction, commercial leasing, etc.) so you build the membership needed to open the school's new doors on time.

Also, ask the committee chairs to inform the governance committee of their upcoming needs. Encourage your board to be as specific as possible in documenting what they might like the new member to accomplish. For example, building on the real estate example above, the facilities committee may request recruiting someone with construction expertise. Adding a board member with specific, relevant knowledge will provide needed leadership and guidance throughout the school's upcoming construction project. Specifying construction expertise helps the governance committee identify which real estate expertise would be most valuable. Without this detail, the committee could have launched into recruiting someone with commercial leasing experience, which is not exactly what that board really needs.

As you look forward, also consider board member succession.

What are the dates that each officer will complete board service?

Which board members' terms expire in the next few years?

How should the board consider proactively filling these vacancies?

While every school has different specific recruiting needs depending on its lifecycle, goals, and current status, there are key categories of skills that are essential for any board including:

<ul style="list-style-type: none">• Finance• Fundraising• Real estate	<ul style="list-style-type: none">• Education• Human resources• Legal
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<ul style="list-style-type: none">• Leadership• Governance• Communications/marketing	<ul style="list-style-type: none">• Strategic planning• Experience relevant to the organization's mission
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4. Assess current board composition

Now that you know where your board composition needs to go, assess the skills, demographics, and characteristics your current board members bring to the table. Consider the following:

Do you have enough people on each committee to manage the committee's workload? Don't underestimate the committee hours needed to deliver on the work promised. EBP recommends at least three members serve on each committee.

Do you have the right mix of skills to accomplish the board's long-term goals?

Do you have the right mix of working styles, available time, networks, and personalities for fruitful discussion, delivery of work, and overall leadership? Consider the characteristics boards need, and ask whether you have these individuals with these traits currently serving on your board. Most boards need members who will

- o Believe that all kids can succeed at the highest level regardless of income
- o Rise to the high stakes nature of the board membership role
- o Make the time, with a "no excuses" commitment
- o Ask hard questions, even when they don't know the answers
- o Make hard decisions
- o Keep a sense of humor

Create a thorough board inventory to track current board members' strengths and the characteristics needed in future members to maintain a healthy and effective board. Consider the example below:

Current board composition inventory

Three-year school priorities outlined in Strategic Plan: Rock Creek Public Charter School

- Scale the school from one campus to two campuses
- Achieve among the highest 10% of schools in the city
- Secure a new facility

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Current board composition

Committee	Board Member	Professional Skills	Characteristics	Demographics
Governance	1. Roxana Chavez	Executive Director, prior governance experience	Bridge builder, team player	Female, early career, Latina
	2. David Lee	Corporate litigation, governance, personal philanthropy	Outspoken	Male, retired, Asian American
	3. Michelle Shelton	Organizational leadership, non-profit management	Worker bee	Female, mid-level leader, white
Finance	1. Brian Washington	CFO	Provides strategic direction, but pressed for time	Male, senior level leader, black
	2. Lisa Walton	CPA, audit, real estate	Great listener and strategic thinker	Female, retired, from the neighborhood, black
	3. Chris Harding	Education finance expert	Great sense of humor, asks hard questions	Male, mid-career, white
Etc...				

5. Compare current composition to future needs, and create recruiting priorities

Once you know your board's current composition and compare it to what your board needs in the future, you can hone in on recruiting needs. Remember, these recruiting priorities are your guideposts—no one individual will have all of your priority skills, experience, demographics, and perspectives. Do your best to articulate your recruiting priorities in writing and share them with the full board so they can be prepared to help where needed and contribute to recruiting these amazing people.

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6. Start recruiting!

Now that you have real clarity on who you are trying to recruit, start brainstorming on how you are going to find these people. Here's an example of how one board defined its priorities and began a plan to find the people who are the right fit:

Recruiting Priorities	Ideas for where to start	Timeline
Finance expertise especially around creating budgets and presenting financial projections	-Jan's Pricewaterhouse Cooper's neighbor -Local chamber of commerce (Beth knows someone there) -Beth's accounting firm	Initial contact with 5 people by Sept 1; plan interviews for at least 2 people by September 15
Emerging leaders who have all around strong strategy and writing skills who can work with committees to complete their part of the application	-Business school alumni groups (Jayvon can talk to his cousin) -McKinsey, etc (get intro to local office)	Initial contact with 3 people by Sept 1; plan interviews for 2 people by September 15
Individual who might bring perspective of our target parent community to ensure we are building a school that will meet community needs	-Parent advocacy groups (find that guy who spoke at that conference in June) -Contact local elected officials/campaign organizers (Jan knows someone)	Initial contact with 15 people by Oct 1; plan interviews for at least 3 people by Oct 15

For ideas on how to recruit a diverse pool of candidates, check out EBP's tool, Recruiting for Diversity.

Once your governance committee has identified prospects, they should develop and articulate a recruiting and interview plan with deadlines and assign tasks to board members and school leadership as appropriate. Below is a sample interview plan/tracker. See our Interview Process tool for a more in depth description of how to do this well.

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Priority areas	Candidates	Source/ date	Screening	Interview date	Status/next steps
Finance	Bob Barker	Intro'd by Jan 9/3	Jayvon had call 9/4, not a great fit for time- he serves on 3 other boards	--	Beth and Jayvon decided not to move forward
Finance	Robert Smith	Intro'd by Jayvon's cousin 8/28	Jayvon had call 8/30, liked him and sent resume to full group 8/31	Beth met on 9/7	Moving forward to tour school and meet ED on 9/15
Community	Clara Jones	Met at event held by Parents First on 8/16	Beth had coffee with her on 9/7, like her and sent resume to full group 9/8		Setting up tour and chance to meet with 2 board members

We know recruiting new board members using a strategic process is a lot of work. Think of this phase of work an investment that will pay off, because once you have the right people around the table, the board's work is not only more efficient, but much more effective. Good luck!