

## Board Member Recruitment – the Power of a Discovery Visit

### Keep this in mind!

It is essential to find effective board members who will fit into the organization's culture and engage in its work. Recruiting board members already known by the organization's leadership is preferable. If you are exploring possible board members with folks not well known by the organization, consider conducting a Discovery Visit.

When setting up Discovery Visits, board members communicate with possible candidates that the organization's leadership is meeting with community members to learn and get input into the organization's reputation and vision. The organization's leadership will use what is learned as they plan and build a list of community members interested in serving on future committees, including the board.

### The Discovery Visit

At the visit, ask open-ended questions like those located below. Ask follow-up questions as the conversation flows.

- Listen more than you speak—a successful visit involves learning a great deal from the potential board member, building a good rapport, and developing a deeper understanding of them. **They should talk 70 percent of the time.**
- Your **30 percent** of talking time should be spent acknowledging that you are listening to them, sharing *one or two* experiences to show a shared frame of reference, answering their questions, and sharing information about the organization and its vision for the future.
- If the potential board member has questions and you don't have the answers, that is okay! Let them know you will check with the office and get back to them with answers. You shouldn't have all the answers; it provides another opportunity to connect and build rapport.
- It is very important to focus on **seeing the world through their eyes and finding ways to connect them to your organization's mission**. Even if you disagree with their viewpoint, try to keep defensiveness and irritation out of the conversation. Try repeating what you heard and say, "I can understand how you came to that view. Here is some additional information that you might find interesting."

### Sample Questions

1. Tell us about yourself – what brought you to the area?
2. Please tell us about your family. Career.
3. What organizations are you involved in?
4. Tell us about your experiences with (THE ORGANIZATION).
5. What do you hear in the community regarding (MISSION EFFORTS)?
6. How would you describe the importance of THE ORGANIZATION to you? To the community?

OVER

*It's time to give a quick overview of the organization, its vision, and its work over the next few years.*

7. Given what you know about the community, what challenges and opportunities do you see for the organization's vision?
8. *(Different questions depending on how the meeting goes).*
  - a. *(Perhaps)* We are seeking people interested in getting more involved in our organization, perhaps to serve on a committee or take on other leadership roles. Would this be of interest to you?
  - b. *(No)* Do you have any other final thoughts I could convey to the leadership?
  - c. *(Yes, Ready to Recommend for Board Membership)* Explain very clearly what effective Board membership looks like to include:
    - i. Board members learn about their essential roles (governance, philanthropy volunteer, and (if applicable – management duties). Reads all materials before meetings and is prepared to take part in discussions.
    - ii. Board members include the Organization among their top giving priorities.
    - iii. Board members invite community members to engage with the organization's leadership.
      1. Invite people to attend tours,
      2. Host gatherings in the community.
      3. Like information on Facebook.
      4. Encourage friends, neighbors, and co-workers to support the organization.
      5. Are comfortable and willing to open doors and make introductions. They are ambassadors in the community.
      6. Willing to participate in community conversations regarding ORGANIZATION. Help dispel rumors, attend local government meetings if needed, write newspaper/newsletter articles about why you support the organization and meet with folks to discuss concerns, visions, and thoughts.
  - d. Would this work be something that would appeal to you?
9. Thank the person for their time and for sharing their thoughts. Ensure that you will share your learnings with the organization's leadership.

### **After the Meeting**

1. Enter your learnings into the donor management system (CRM). Ensure the organization has all current contact information, especially email address and cell phone number.
2. Get answers to outstanding questions and e-mail or call the interviewee with answers.
3. Send a thank you email.
4. If you ask someone to join the board, provide them with a written job description, expectations, and board meeting dates.

*Multiply the Good!*