



## RECRUITING

- Attributes
  
- Skills
  
- Always be recruiting
  
- Before they say “yes”:

  - Why they are needed
  - Term lengths
  - Expectations
  - Important dates
  - Responsibilities

## ONBOARDING

### What do board members need to know?

- Background on the focus of the mission
- High level view of the strategic plan
- Roles and responsibilities
- Procedures/Robert’s Rules cheat sheet
- Contact information for board and key staff
- Financial status
- Expectations
- Challenges
- Programs
- Key dates
- History
- Bylaws
- \_\_\_\_\_
- \_\_\_\_\_

When do they need to know this?

R = Recruiting

B4 = Before they start

1 = First month of service

3 = First 3 months of service

## How should it be shared?

- Large group/Orientation (L)
  - Quiz
  - Activities
  - Presentation
- One-on-one (1-1)
- Online portals (OP)
- Emails (E)
- Board Notebooks (BN)
- Videos (V)
- Mentorship (M)
- Researching and teaching (RT)
- \_\_\_\_\_
- \_\_\_\_\_

## What do they need to experience?

- The organization in action
  - Programs
  - Fundraising event
  - Graduation
  - An ask for donations
- Testimonials of impacted students
- A board meeting
- Board social
- Board training
- Orientation

## CONNECTING

### Who do they need to connect with?

- Executive Director
- Board President
- Board Mentor
- Other board members
- Key staff
- Recipients
- \_\_\_\_\_
- \_\_\_\_\_

### Create Connections

- Remember we're all different
- Facilitate at board meetings
- Mix up seating arrangement
- Icebreakers
- Involve them early
- Encourage
- Go see them
- Call them

## EQUIPPING

### Host Annual Retreats

- Discuss relevant topics
- Have an outside speaker
- Strategic Planning

### Learn Together

- Articles and books
- Research and share
- Board Training

### Experiences

- Spokesperson
  - Skill Development
  - Equipping with information
  - Opportunities

### CHALLENGING

- Help them identify their unique impact:
  - What do you see as the greatest need?
  - What's the best use of you?
  - What will be your impact this year?
  - How do you see yourself impacting the strategic plan?
  - What's the legacy that you want to leave behind?
- Define your board culture and promote it
- Provide Vision
- Evaluate
  - Group evaluation
  - Self-assessment
  - After Action Review

### GOVERNING

- Board Chair & Executive Director Relationship
  - Clear on differentiation in roles
  
  - Agreement on \_\_\_\_\_
  
  
  
  
  
  
  
  
  
  
  - Questions they should ask each other
  
  
  
  
  
  
  
  
  
  
  - Key ingredients
    - Agreed upon vision (organizationally and as a pair)
    - Open, regular and consistent communication
    - Adhere to schedule of meetings and touchpoints
    - Understanding of one another's strengths and weaknesses
    - Appreciation, respect and trust

## **GOVERNING** (continued)

- Gaining Better Input and Decisions
  - Use consent agenda
  - Provide variety
  - Hear stories
  - Quiz them

Additional Notes:

# Board Development Bootcamp

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*What stood out to you from this session?*

*What do you need to share with your colleagues?*

*What three things will you do differently in light of this session?*

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Thank you!  
Brian Brandt



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903-316-2540  
Brian@coreinsightsleadership.com

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