

## 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?

- |                          |                          |   |  |
|--------------------------|--------------------------|---|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Background on the focus of the mission      |  |
| <input type="checkbox"/> | <input type="checkbox"/> | High level view of the strategic plan       |  |
| <input type="checkbox"/> | <input type="checkbox"/> | Roles and responsibilities                  |  |
| <input type="checkbox"/> | <input type="checkbox"/> | Procedures/Robert’s Rules cheat sheet       |  |
| <input type="checkbox"/> | <input type="checkbox"/> | Contact information for board and key staff |  |
| <input type="checkbox"/> | <input type="checkbox"/> | Financial status                            |  |
| <input type="checkbox"/> | <input type="checkbox"/> | Expectations                                |  |
| <input type="checkbox"/> | <input type="checkbox"/> | Challenges                                  |  |
| <input type="checkbox"/> | <input type="checkbox"/> | Programs                                    |  |
| <input type="checkbox"/> | <input type="checkbox"/> | Key dates                                   |  |
| <input type="checkbox"/> | <input type="checkbox"/> | History                                     |  |
| <input type="checkbox"/> | <input type="checkbox"/> | Bylaws                                      |  |
| <input type="checkbox"/> | <input type="checkbox"/> | _____                                       |  |
| <input type="checkbox"/> | <input type="checkbox"/> | _____                                       |  |

When do they need to know this?

- R = Recruiting
- B4 = Before they start
- 1 = First month of service
- 3 = First 3 months of service

## Board Development Bootcamp

### 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

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## **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

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## 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

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### **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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