



The Recruiting Process

Assuming that you, TREE Fund Trustee, have read the Board Qualifications Statement describing the requisite skills, qualities, and membership criteria, it's time to begin recruiting. The following outlines the steps for identifying, cultivating, and interviewing potential Trustees based on our culture and needs.

Use the following guidelines as a starting place to give you ideas. Keep the *Board Qualifications Statement* nearby as a guide along the way, keeping in mind:

- The skills and experience the board needs;
- The qualities the board needs; and
- The membership criteria for our board.

To find the best Trustees who meet our qualifications, consider the five steps described below:

- Identify board prospects for the present and future
- Invite candidates to apply
- Interview candidates
- Invite candidates to a board meeting
- Nominate new members and vote

1. Identify Board Prospects - For the Present and Future

Once the board understands exactly who it needs, we can begin to identify prospects. Be on the lookout at all times for new prospective Trustees. This way, we don't need to rush to locate new members. Start by tapping into who the board already knows, then ask colleagues and grantees to suggest prospects. You might also look in the newspaper, newsletters or journals for experts involved in your program areas. Potential members might include:

- a. Experts in a particular cause or field. These could be staff or volunteers from other nonprofits, researchers, or authors, business owners;
- b. Elected officials and other community leaders;
- c. People who can inform the board about a specific area of interest;
- d. Community foundation or private foundation Trustees; and
- e. Representatives from the constituencies you seek to serve.

Maintain an up-to-date list of potential board candidates, including the particular skills they can bring to the organization. Remember to look for

candidates who offer a mix of abilities and who will help carry out our foundation's mission.

2. Invite Candidates to Apply

When you first approach prospective Trustees, inform them about what the foundation does and why you are involved and then gauge their interest. If the prospect shows interest and potential for meeting the board's needs, involve them by asking them to an event or review the website with them. Ask him/her to complete a *board application form* which can be found on our website. The form is short and simple. It gathers the following:

- a. Name and contact information;
- b. Education;
- c. Professional background;
- d. Experience serving on nonprofit boards; and
- e. Other community service experience.

Send the link to the online application form with a brief invitation e-mail describing the foundation and its work and the expected time commitment (average 8 hours/month; 3 meetings annually -1 is a webinar).

A completed application form helps to introduce the candidate to the board and may also help later on as the board tries to match activities to the new board member's skills and interests.

3. Interview Candidates

The Governance Committee or two board members conduct the interview. Here are some interview questions that may be asked:

- a. What aspects of the foundation's work interest or excite you?
- b. What is your board service, leadership, or volunteer experience?
 - i. Are you presently serving on other boards?
 - ii. What do you want to learn from your service?
- c. What are your skills, expertise and circle of influence? How do you think the foundation could best take advantage of your experience?
- d. What would you expect from a board and your fellow Trustees? Are you comfortable with the foundation's board member responsibilities and time commitments? Are you willing to serve on committees? Can we expect you to actively and regularly participate in board meetings and committee meetings?
- e. Are there any potential conflicts of interest for you in serving on the foundation's board (for example, professional or personal relationships)?

The interview is a good time to share information about the foundation, its mission and history, and the job description listing the main responsibilities of Trustees. You might provide names of several board members whom the prospect can contact with any questions. If there are term limits for board members, be sure to explain what they are.

Explain the benefits of board service: for example, as a learning and networking experience, as a way to practice philanthropy, and/or to pursue his or her passion for a particular cause.

4. Invite Candidates to meet with current Trustee(s) and Committee Chairs possibly at industry meetings.

5. Invite Candidates to a Board Meeting

Invite strong candidates to attend a board meeting - as observers, not participants. While this isn't a necessary step for recruitment, it gives the candidate excellent insight into how the board works. This will help the candidate make the decision whether serving on the board is right for him/her. The recruiting Trustee should call the next day to ask if the candidate had any questions about the meeting, the board's process, or the foundation's purpose.

6. Nominate New Members and Vote

After meeting the prospective member and receiving a recommendation from the Governance Committee, the board may be ready to nominate and elect the new Trustee. Before the voting begins, the Governance Committee should identify any potential conflicts of interest the candidate might have. List any grantee organizations, past or present vendors, or family members of current Trustees with whom the candidate may be associated. If the board votes to approve the candidate, it's time to formally invite the new Trustee to join. The board Chairman will send a letter of invitation, including information on Trustee roles and responsibilities, the time commitment expected, and whom to contact with any questions.