

RECRUITING BOARD MEMBERS: LEVERAGING THE 4 PHASES OF BOARD RECRUITMENT CULTIVATION | RECRUITMENT | ORIENTATION | ENGAGEMENT

FACILITATOR GUIDE



VIEW • INSPIRE • ENGAGE

1'Corinthians'4:2'reminds'us'that'to'be'a'steward'it'is'required'that'one'be'found'trustworthy.

Whether you volunteered for this facilitator role or you were the victim of creative delegation, thank you for investing time in your board's future effectiveness! Here are some ideas and tips for facilitating your board's conversation on "Recruiting Board Members: Leveraging the 4 Phases of Board Recruitment."

ECFA Governance Toolbox Series No. 1 includes:

- 1 DVD (13 minutes)
- 12 *Board Member Read-and-Engage Viewing Guides*
- 1 *Facilitator Guide*

Before the board meeting:

View the DVD and select one of the three suggested discussion options. Allocate time in the agenda for this governance learning experience (preferably near the beginning of the meeting). Pre-screen the DVD before the meeting to be sure the AV equipment works.

During the board meeting:

Build the core value for being a "learning organization" and why board recruitment for a Christ-centered board is so critical. Inspire board members to engage in this process. (See the suggestion for creating groups of two.)

After the board meeting:

Capture all the discussion with a note-taker and flipchart pages—and then delegate Action Steps to the appropriate committee or task force.

Email periodic reports to board members so they will connect the dots between the time invested in the meeting with real results in recruitment. (This will enhance future engagement in life-long learning.)

May God bless your facilitation efforts and may He grant your board wisdom and discernment as you reflect on recruiting new board members!

Dan Busby
President
ECFA



"3' DISCUSSION' OPTIONS



"SEE 'PAGES 7-8' | 'CULTIVATION

OPTION 1: 15-30 minutes

VIEW: Screen the entire video without stopping and ask board members to follow along in the *Board Member Read-and-Engage Viewing Guide*.

INSPIRE: At the end of the video, divide into groups of two and ask board members to take the Pop Quiz on page 5. Then ask them to discuss their answers with their board partner.

ENGAGE: Now... "define reality" and, going in order around the room, ask each board member to "Stand and Declare" by completing this statement: "I believe we need to be more effective in the _____ phase because _____." Assign next steps to the appropriate committee.

OPTION 2: 30-60 minutes

VIEW: Stop the video at the end of each phase and ask board members to complete the four "reality checks" in the *Board Member Read-and-Engage Viewing Guide* (pages 8, 11, 14 and 17).

INSPIRE: At the end of the video, divide into groups of two and ask each group to recommend at least three Action Steps (see page 18) for the appropriate committee to consider.

ENGAGE: Ask each group of two to report on their Top 3 Action Steps recommendations. Write the Action Steps on a flipchart or whiteboard—and then assign next steps to the appropriate committee. (Or take 30 minutes more for straw votes on top priorities.)

OPTION 3: Board Retreat or a 2-Hour Board Development Session

VIEW: Stop the video at the end of each phase and ask board members, on their own, to complete the four "reality checks" in the *Board Member Read-and-Engage Viewing Guide* (pages 8, 11, 14 and 17).

INSPIRE: At the end of the video, divide into four groups (one for each phase) with pre-selected facilitators. Inspire board members to define reality and think about the kind of board you'll need in five to 10 years—and what must happen to get there.

ENGAGE: Ask for reports from each group and prioritize the Top 10 recommendations. Observe which board members have high passion for this task and inspire them to serve on a task force to help envision a new approach to board recruitment!

GOD-HONORING BEST PRACTICES

It's possible that some of your board members have not connected the dots between board recruitment and spiritual discernment. Inviting people to consider board service is a spiritual exercise. Board members and board prospects must all hear from God.

You won't find a spiritual discernment process in a secular "how to recruit board members" guide—but it is at the heart of board recruitment in Christ-centered organizations. There are many other best practices and your board may already be doing some of them well. Congratulations!

REALITY CHECK ON OUR CULTIVATION EFFECTIVENESS

(Scale of 1 to 5)

Before you hit "play" on the video, ensure that everyone has a copy of the *Board Member Read-and-Engage Viewing Guide*. During or following the video, review the eight Cultivation questions listed on page 8.

Note: Breaking into groups of two enables each board member's opinion to be valued—and minimizes the potential that someone may monopolize the discussion.

In advance, identify your formal or informal "pathway to the board" checklist (Question 6)—and distribute copies to everyone. That's a great starting point. Ask for input, additions or deletions.

As a board (or the appropriate committee), affirm any Action Steps that are needed in the Cultivation phase.

RESOURCES:

Visit the ECFA Governance Toolbox resources website for more resources and book recommendations:



[ECFA.org/Content/Governance-Toolbox-Series-1](https://www.ecfa.org/Content/Governance-Toolbox-Series-1)

- **Book:** *Strengthening the Soul of Your Leadership: Seeking God in the Crucible of Ministry*, by Ruth Haley Barton
- **Book:** *Pursuing God's Will Together: A Discernment Practice for Leadership Groups*, by Ruth Haley Barton



"SEE PAGES 10-11" | RECRUITMENT



"SEE PAGES 13-14" | ORIENTATION

MEASURING PROSPECTS AGAINST BOARD-APPROVED CRITERIA

Great boards have both formal and informal “measuring sticks” to discern which of many possible prospects best meet their board-approved criteria for board service.

Focused criteria, based on the unique needs of your ministry, are preferable to a long laundry list of unrealistic expectations punctuated with unrelated Bible verses. (Would Peter or Paul meet your criteria?) If you don’t yet have board-approved criteria, start with the “6 Ds” on page 10—and wordsmith the list to make it your own.

REALITY CHECK ON OUR RECRUITMENT EFFECTIVENESS

(Scale of 1 to 5)

With the board, review the Reality Check on page 11 in the *Board Member Read-and-Engage Viewing Guide*. It may be helpful to stay in groups of two through this entire process.

Ask each board member to share his or her highest and lowest ratings—perhaps with brief comments of a minute or less. (If your time is short, set a one-minute buzzer on your cell phone for each report.)

Remember—the drill is not just to get through this assignment, but to discern God’s voice as you trust Him to provide people who will be faithful stewards/board members of your ministry. It’s a high calling!

RESOURCES:

Visit the ECFA Governance Toolbox resources website for more resources and book recommendations:

 [ECFA.org/Content/Governance-Toolbox-Series-1](https://www.ecfa.org/Content/Governance-Toolbox-Series-1)

- **Download:** Board Nominee Orientation Notebook (sample Table of Contents)
- **Download:** Board Member Annual Affirmation Statement (sample template—identifying the “3 Hats of a Board Member”)
- **Download:** “The Board Bucket” chapter in the book, *Mastering the Management Buckets*, by John Pearson

THE PROCESS OF ONBOARDING NEW BOARD MEMBERS

As you guide your board members through a discussion of a “5-Star Orientation Process,” you might ask them what they would prefer if they could go back and zero-base their own onboarding process as new board members:

- Talking head or interactive?
- One jam-packed session or several sessions?
- Detailed information or just the big ideas?
- Led by board members or staff members?
- Assigned or random “board buddies”?
- PowerPoint, YouTube or flipchart?
- A focus on the unique flavor of a nonprofit ministry—and the spiritual implications?

Then think about the ideal board prospects you will be courting five years from now. What orientation process would best meet their needs? One size doesn’t fit all. Learning styles and social styles will be diverse. (Yes, this is hard work, but it is Kingdom work!)

REALITY CHECK ON OUR ORIENTATION EFFECTIVENESS

(Rate: 1 to 5 stars)

With the board, review the Reality Check on page 14 in the *Board Member Read-and-Engage Viewing Guide*.

Keep the feedback loop interactive—and go around the room, one-by-one, so every board member is engaged and valued.

RESOURCES:

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 [ECFA.org/Content/Governance-Toolbox-Series-1](https://www.ecfa.org/Content/Governance-Toolbox-Series-1)

- **Download:** Board Nominee Orientation Notebook (sample Table of Contents)
- **Book:** *Board Member Orientation—The Concise and Complete Guide to Nonprofit Board Service*, by Michael E. Batts
- **Book:** *The Imperfect Board Member*, by Jim Brown
- **Website:** www.BoardSource.org



ENGAGE YOUR BOARD MEMBERS BY DATING AFTER THE WEDDING!

What if, in the video, the Christian camp director had taken time to bring Tom through the circles of involvement—perhaps over an 18- to 36-month process? What if Tom had been inspired to leverage his spiritual gifts, his strengths and his social style—to the glory of God?

When board members sense a holy calling to serve on your ministry's board, the ripple effect is immeasurable! But when the recruitment process is short-changed, the results are rarely God-honoring. So inspire your board members to engage deeply in God's work.

REALITY CHECK ON OUR ENGAGEMENT EFFECTIVENESS

(Scale of 1 to 5)

With the board, review the Reality Check on page 17 in the *Board Member Read-and-Engage Viewing Guide*. If your board doesn't conduct an annual board self-assessment (to measure engagement and effectiveness), select a process and put it on the calendar.

In groups of two, or going around the room, identify the Action Steps needed in this critical Engagement phase.

RESOURCES:

Visit the ECFA Governance Toolbox resources website for more resources and book recommendations:



ECFA.org/Content/Governance-Toolbox-Series-1

- **Download:** Engagement—Inspiring Board Members to Focus on the Future vs. Micro-managing the Present
- **Book:** *Owning Up: The 14 Questions Every Board Member Needs to Ask*, by Ram Charan
- **Book:** *The Five Most Important Questions You Will Ever Ask About Your Organization*, by Peter Drucker
- **Book:** *StrengthsFinder 2.0*, by Tom Rath
- **Book:** *What You Do Best in the Body of Christ: Discover Your Spiritual Gifts, Personal Style and God-Given Passion*, by Bruce Bugbee
- **Social Styles Website:** www.tracomcorp.com (resources on social styles: most boards have all 4 styles: Driver, Analytical, Amiable and Expressive)



Enhancing Trust

PRIORITIZING YOUR ACTION STEPS:

**"Put God in charge of your work, then what
you've planned will take place."
Proverbs 16:3, *The Message***

Peter Drucker said, "Vision without execution is delusion." So be sure to invest time in discerning what your Action Steps should be in the four areas of Cultivation, Recruitment, Orientation and Engagement.

The best boards take responsibility for their own board development—they don't delegate governance work to the CEO or the staff. So think creatively how you will implement what you've learned from this *ECFA Governance Toolbox Series*.

#1: Four Flipchart Pages. Post a flipchart page in each corner of the room (one per phase): Cultivation Action Steps, Recruitment Action Steps, etc. Then list the action steps suggested by the groups of two on the appropriate flipchart pages.

#2: Vote for the Top 3 on Each Page. Ask each board member to visit the four corners and, with a marker, place checkmarks by his or her Top 3 Action Step choices on each page. (On each page, each member can cast up to three votes on any one action step, or split his/her votes: 1, 1, and 1; or 1 and 2 votes.)

#3: Total the Votes. Add up the votes on each of the four pages—and then circle or highlight the Top 3 proposed Action Steps in each of the four phases.

#4: Delegate the Plan. Now with this draft consensus from the board, delegate the work to the appropriate committee (or a short-term task force).

#5: Pray for God's Wisdom. Continue to pray for wisdom as you spiritually discern direction for the board recruitment process.