

Effective Board Leadership

A P R E G N A N C Y R E S O U R C E M A N U A L



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SECTION 3

Member Recruitment, Orientation, and Training

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The Board Membership Process

Recruiting Board Members: Building Your Center's Future

One of the best ways to ensure the success of your center's ministry is to build an effective and committed board of directors. The key to building a great board is strategic board recruitment. When your board follows a process to recruit respective board members, there are many benefits.

- Board members will be properly oriented and trained.
- The composition of your board will reflect a healthy diversity of gifts, backgrounds, and perspectives.
- You will build a pool of potential board members for the future.
- Problems will be prevented, such as the board member who does not attend meetings or the board member who does not following through on assignments.

No matter what the size of your center or board of directors, following a few simple steps and taking the time to properly recruit new board members will help build a strong foundation for your center.

Board recruitment involves more than just bringing new members to your board. It also encompasses the orientation and training of board members. The nominating committee plays a key role in this process of board orientation and development.

The Role of the Nominating Committee

One of the most important committees that your board can appoint is the nominating committee. This committee is usually composed of several members of the board and the director of the center. The board chairman appoints the committee and may be a member or *ex officio* member of the committee. Terms of office can be determined by the board. The board chairman may also name the chairman of the nominating committee. If your board does not have a nominating committee, you may appoint the committee at the next board meeting.

The nominating committee has five main responsibilities:

- 1) **Overseeing the recruitment process of new board members.**
The nominating committee receives and evaluates the names of potential board members, contacts the nominees, and conducts interviews with the nominees. Members of the committee shepherd the nominee through the recruitment process.

2) Orienting new board members.

The nominating committee develops and distributes information packets to incoming board members, gives tours of the center and sets up meetings with the staff.

3) Evaluating the performance of current board members.

The nominating committee assists the board members in an evaluation process that will increase the effectiveness of individual members and the board as a whole. Often the board members complete a self-evaluation and then review the evaluation with the chairman of the board.

4) Coordinating the election of officers of the board.

The nominating committee works with the board to present a slate of new officers of the board when it is time for the election of officers.

5) Planning for training and development of the board.

Often the members of the nominating committee plan retreats or special meetings of the board, perhaps selecting topics, books, or videos to help the board members become better informed and more effective.


Finding Potential Board Members

Often centers have difficulty finding candidates for board membership. Perhaps they have had several board members rotate off the board in a short period of time, their ministry is new in the community, or they find that people are over committed and just too busy to serve. Sometimes a center is having difficulty finding board members because they have not been building a pool of potential board members through work in the community and churches.

The best board members are those who have already demonstrated their willingness to work by serving on special committees or as pregnancy center liaisons in their local churches. A banquet committee chairman may make an excellent board member next year. Someone who has worked hard for the center in their local church might be willing to take on a bigger commitment as a board member.

However, if the center is not building those relationships in the community, there is no pool of committed people to draw upon for board membership. Board members, just like financial resources, tend to be available when the board and staff of the center are out in the community and churches making friends and telling the story of the center.

When the board nominating committee is working well, it should be much easier to recruit board members. The committee will know when



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board members are rotating off the board and should be thinking ahead to the future needs of the board. Their job is to advise the board about new board members and to help prevent future problems, such as too many board members rotating off at the same time, too many board members who attend the same church, or not enough names to consider for membership.

Where to Look

The place to begin looking for new board members is closest to home. Begin seeking names from those who are most committed to the work of the center.

- 1) **Ask former board members for names of candidates.**
Your board members have firsthand knowledge of what being a board member involves. They are usually people who have built networks in the community and churches and know who might be willing to serve.
- 2) **Check with your volunteers.**
Volunteers have their own network of pro-life friends. They can be a good source of names to consider for membership.
- 3) **Review your committees and church coordinators.**
This is the best source of board members. Committee chairmen who have worked on a specific project for the center are often willing to assume more responsibility.
- 4) **Consider looking through your list of donors.**
Many times donors prefer to serve through financial giving to the center. However, you may find several good names to contact when you look through your donor list.
- 5) **Find out who are the strong pro-life Christians in the local churches.** Perhaps they would not be willing to serve as board members immediately, but take the opportunity to begin building a relationship with them and let them know about the work of the center. They may be great board members in the future.

Brainstorming for Board Members

Many times it helps to have a brainstorming session in order to choose names of potential board members. Gather your board members, director, other key staff members, and several volunteers. Set aside enough time to adequately explore all avenues of generating names, and use that time to compile your list. You might want to make your donor list available to your chairman just to provide some suggestions. Begin the session with prayer and ask God to give you the names of those He

would have serve. Let this be a time when everyone has a chance to present names. Do not attempt to evaluate names during this session. The nominating committee will review and evaluate the names later. This session is intended to generate as many names as possible. People should feel free to propose a name and not feel as though that name will be rejected by the group.

A Process for Board Recruitment

Listed below is a sample process you may use for recruiting board members. You may want to adjust these steps to meet the unique needs of your center, but be sure you include at least three steps in any membership process you select: 1) interview, 2) application, and 3) board meeting visit. The steps are intended to give the board many opportunities to see if the board candidate is willing and able to serve on the board. They also give the candidate many opportunities to see if he/she really wants to be a board member. The goal is to get the best possible board members for the center. That means allotting time to get to know the candidates, letting them know your expectations, and helping them get to know your ministry and your current board.

The following steps for member recruitment may take extra time and effort for your board and nominating committee, but they will prevent many problems and result in better candidates.

1) Names are Submitted to the Nominating Committee

The nominating committee is a clearing house for prospective board members. It is the nominating committee's job to review the names and submit a screened list of names to the full board for consideration. The committee considers the needs of the board and the gifts and skills required of board members. The committee reviews the composition of the current board to check for diversity in church membership and gender. The committee also reviews the list of possible candidates see if they possess the skills and gifts needed by board members.

After a complete review, the nominating committee submits a list of names to the full board for review. The board then approves the names and the committee is free to make contact with the potential board recruits.

2) Contacting the Board Nominees

The first contact with the nominees usually comes from the chairman of the board or the chairman of the nominating committee. The chairman asks the nominee if there is interest in serving on the board. If the answer is affirmative, then an interview with the candidate is requested and scheduled.

The first meeting should include the candidate's spouse (if possible) and take place in the candidate's home. This is a time to get acquainted and to ask questions.

The director, chairman of the board and another board member should take part in this interview. This is also the time to give the candidate an information packet about the center. The packet should include:

- A mission statement, bylaws, the strategic plan, and the Statement of Faith
- A current board and staff list and a board/staff organizational chart
- Any recent publications, such as brochures and newsletters
- A listing of the center's programs
- A short history of the center

The committee may also want to give the candidate an application for board membership and board reference *sheets*. It is a good idea to give the candidate an opportunity to answer questions in writing about their Christian testimony and pro-life convictions. This will also give other board members a chance to review the application since they were not present at the interview.

It is vital that you clearly communicate your expectations for board members. If you are considering this candidate for a seat on a particular committee or to help with a specific project, let them know of the specific responsibilities and the time commitment involved. The candidate will also want to understand the time commitment necessary for general board participation. Be honest with them.

3) **An Invitation to a Board Meeting**

Following the interview, the nominating committee may convene and review the meeting and the candidate's application. Assuming that the committee and the candidate want to proceed with board membership, the chairman may want to invite the candidate to all or part of a board meeting. This is an opportunity for the prospect to meet the board and to see how board business is conducted. This is also a chance for the board members and the candidate to ask any final questions prior to a vote being taken. Of course, candidates should never be privy to confidential information that may be discussed in a board meeting.

4) **A Vote on Membership**

The board should now be ready to conduct a vote on this candidate's membership. It is normally a good idea to wait a few days after the last meeting with the candidate before taking the vote. This gives



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board members a few days to pray for God's guidance prior to actually casting a ballot. The vote may be conducted via telephone or at a subsequent board meeting.

Given the size of most of our local center boards, a unanimous affirmative vote is the suggested criterion for membership. Any questions about the candidate should have been answered by the interview, the application, and the attendance at a previous board meeting. Center boards must work together very closely and a less than unanimous vote for membership may undermine that relationship.

5) **Orientation of New Board Members**

After an affirmative vote, it is time to welcome and orient the new board member. The chairman of the board should write a letter of welcome to the new member. The chairman may want to assign a current board member to shepherd the new recruit through the first few months of membership. That current board member would be available to answer any questions and provide any additional information that may be required.

Orientation for new board members should begin immediately. New members should spend time with the director and meet staff members. If they are assigned to a board committee, they need to know the goals and projects assigned to that committee. It is a good idea to let new board members review the board meeting minutes from the past year to gain a historical perspective of the center's progress.

After election to the board, the new board members need a full orientation. The orientation should include:

- The history, background, and mission of the center
- An understanding of the center's personnel and programs
- An explanation of the responsibilities of board members
- An explanation of the structure and policies of the board

A Board Policies and Procedures Manual

It is helpful to develop a board manual for all board members, but particularly for the orientation of new center board members. We have compiled a board manual outline on the next page for your reference.

Board Manual Outline

1) Board Administration

- Board member roles and responsibilities
- Board organizational chart, including board committees
- Names and addresses of board and staff members
- Board meeting times, board schedule, and annual calendar
- Board policies and procedures, including attendance and reimbursement for expenses
- Bylaws

2) Board Finances and Fundraising

- Annual budget
- Annual audit
- Fiscal calendar
- Listing of fundraising programs and sources of funding
- Job description of Budget and Finance Committee members
- Fundraising expectations for board members

3) Board and Staff

- Personnel policies and procedures
- Staff job descriptions
- Staff organizational chart
- Job description of the Personnel Committee and its members
- Sample director evaluation form

4) Board and Ministry Programs

- Description of all center programs
- Sample brochures and publications from the center
- Reports on the programs of the center

5) Board and Planning Oversight

- The mission statement of the center
- The strategic plan of the center
- A brief history of the ministry



Care Net's annual Pregnancy Center Conference has workshops on issues of board development, training and other vital topics.

Board Training and Development

It is important that board members continue to receive training about board topics after they have joined the board. The additional resources listed at the end of each section of this manual are great reading for board members. Your board may want to periodically focus attention on a specific board topic, such as resource development or board recruitment, and assign reading to board members. Your board would then be ready to meet and share ideas and plans about that particular topic. This is another way to promote board development.

Conclusion

Effective board recruitment, orientation, and training are the best methods of building the foundation of your center's ministry and ensuring its future. You may adopt or adapt the suggestions in this section to fit the needs of your center. Your board and the entire ministry will benefit from your efforts to bring commitment and quality to your board.

Growing a Healthy Board

by Michael Daily

Join me for a minute at a great board meeting: Mary, this year's chairman, arrives 20 minutes early. Along with a stack of file folders bristling with agendas and reports, she's cradling a shopping bag full of refreshments. Right on her heels is Bill, the vice-chairman, armed with files of his own and another bag. Only his bag smells better - he's just come from a really nice Italian restaurant down the street.

About this time, Betty the treasurer walks in, smiles, and rolls her ever cost-conscious eyes. "That smells great, but isn't that going to run more than our usual \$5 per person contribution?" Bill replies cheerily, "Not tonight. I'm treating. Speaking of per person, is everyone able to come tonight?"

"I polled everyone yesterday," says Mary. "Everyone's coming, but Art's probably going to be a few minutes late - his law firm's really been hopping lately."

"And look who's here early - the good Reverend Charles" Bill observes.

"There's none good, but God alone," Charles quotes with a big smile, "but I am here, and blessed to be so. This is the day the Lord has made!"

"And we will rejoice in it," chimes in Warren, the executive director, followed into the room by Paula the recording secretary, and Roberta, an M.D. who's just recently joined the board.

Moments behind them, Art the lawyer pops in. "Killer traffic! I hope I'm not too late."

"I'm so proud of all of you," beams Mary, "you guys are so good about coming to our meetings and getting here on time. I'm gonna be a sad little puppy when my term is up and I have to rotate off."

"Us too," Warren teases. "No other board chairman ever brought such nice desserts!"

After a relaxed meal, things get down to serious business - a long time of prayer. Back and forth across the table, members pour out their hearts to God, touching on center business, personal needs, family concerns - each person connecting with and adding to the prayers of the one preceding. Cares melt away. It's as if the heavens open, and a thick ocean of peace floods the room. Nobody wants it to end, but when silence begins to linger a few moments, Mary brings the prayer time to a close with a hearty "amen!"

The rest of the meeting is filled with interesting discussion, proposals are examined from multiple angles, and issue after issue is laid to rest. When it's time to wrap up, the sense of harmony and accomplishment has energized everyone.

Paula shares, "I've enjoyed the past two years with you folks so much; I'm already getting depressed about having to leave when my term's up next summer. I don't think I've ever seen a group of people work so well together and accomplish so much."

Sound far-fetched? Actually, that scenario was a composite of real experiences gleaned from actual board meetings over the last few years. (Names have been changed to prevent too much self-congratulation!) How does such a board - competent, caring, dedicated, spiritual, gracious, serving - come to be? Perhaps a garden is a good metaphor - it's not instant, it's not by accident, and God is responsible for all the really hard stuff. If you'd like to grow a great board, here are some steps you might want to consider:

Preparation

Just as a garden needs properly prepared soil to flourish, you need to make your center a place where quality board members will join and thrive. What can you do that will make your center the kind of place someone would be eager to serve? Your mission is great, we know that already. But would someone looking at your board see your center as a place where they can contribute and be fulfilled? It's critical that you do everything you can to make your center an attractive, exciting, invigorating place to serve.

Related Articles

Look at your current board from an outsider's perspective. Are the meetings harmonious? Is there a solid foundation of good practices? Can you identify problem areas that would cause someone to have second thoughts about joining?

If your center needs a lot of work, don't fret. Turn this into a selling point by marketing yourself as a project where someone with vision and troubleshooting skills can really make a difference. (A note of caution here, don't paint too bleak a picture; you don't want to scare prospects away!) And if you do recruit someone to help solve your problems, don't tie their hands, let them work!

If your center is in great shape, that's an attraction in and of itself. It's a cliché, but it's true - quality attracts quality.

Selection

If you want prize-winning tomatoes, plant a prize-winning variety, right? Better yet, why not transplant a whole plant that's already bearing fruit? By this I mean specifically recruiting people who have demonstrated successful leadership somewhere else. Some of the most effective members we've ever had were men and women who headed their own companies. As entrepreneurs, they had to understand every aspect of how a business works: human relations, finance, accounting, administration, planning, etc. As a result, their insights proved invaluable.

Because of the numerous and complex issues facing centers, it's important to recruit for a wide range of knowledge and skills among your members. Our center purposefully seeks people with different ways of thinking, faith tradition, ethnicity, occupation, economic standing, age, place of residence. When we have a thorough mix of personality types, talents, outlooks, and life experiences, we are much, much more gifted than a homogenous group.

This brings up the question, where do you find all these gifted, knowledgeable, and hard-working people with extra time on their hands? Not surprisingly, one of the most challenging aspects of board recruitment is coming up with names of suitable candidates. Try thinking about this backward - figure out where you found good board members in the past. In our case, I realized they all had one thing in common - they were either an acquaintance of mine or someone already on the board.

Look over your various lists - donors, special event participants, and training rosters - while prayerfully considering their suitability for board service. Chances are, the kind of person you're looking for already supports your organization in some way.

We've had much success with this not-quite-serious threat - you can't leave our board until you find your replacement. Before members rotate off, they're asked to "replace" themselves with someone they know who has similar faith background, experience, and perhaps even the same profession. This concept has yielded more quality members than perhaps any other strategy we've tried.

Another strategy is to purposefully expand your circle of acquaintances. Personally, I have made it a point to join and serve other Christian organizations. While board recruitment was not my motive for doing so, I have made many wonderful, talented new friends and yes, eventually invited some of them to serve on our board. As an added bonus, I receive quite an education watching how other organizations conduct themselves.

One last word on selection - be particular. Just because someone has served with distinction as a volunteer, they don't necessarily have the qualities needed to be an effective board member. The best counselor you've ever had may be completely out of place on the board. In the same way, just because someone comes from a certain profession, say law or medicine, their particular skills may not be exactly what you're interested in. (Unless, of course, you've got a surgery or a civil suit on next week's agenda.)

Related Articles

Be sure whomever you ask to serve has not only the knowledge and skills you need, but also the inner qualities and values you desire.

Which brings us to...

Planting

You've tilled your soil, you've picked out some varieties you think you'll enjoy; now, how do you put them in place? Once you've identified some prospects who you think will make good members, they need to go through a nominating and election process. The goal is to make sure that both candidate and board are completely comfortable with each other. Our center has a standing committee whose job it is to take this process from start to finish. They receive nominations, review their qualifications, determine interest, conduct an interview, and then report their findings to the full board for a final vote.

A really helpful tool we developed for this is our "prospect packet". Sent to each nominee, it contains general information about our board, as well as specifics about meetings, duties, and time commitment. We include an application soliciting biographical information and references. It also asks their opinions on abortion and related topics, and whether they have read and agree with our statements of faith and principle.

No matter how good the completed application looks, we always go to the next step - a face-to-face interview by the director and at least one other board member. As one of my board members observed, it's amazing what you learn listening and watching in person. We're looking to see if our values mesh well enough to be able to work together.

The final step is for the nominating committee to report to the full board. This is not a mere formality. The board uses its collective wisdom to decide whether they believe the nominee will be a welcome and productive member.

All this sounds like a lot, but you'll probably discover as I have, that time and energy put into the recruitment process is well worth it. Because, whatever your center needs - adequate finances, quality staff, sufficient volunteers, plenty of clients, or excellent services - these are the fruit of a truly healthy board.