



The Landing Spot

A resource for nonprofits and their board members

The purpose of this document is to provide a resource for nonprofit executive directors, board members, and potential board members to assist with the recruitment, retention, and engagement of board members.

Members of the Leadership TriCounty class of 2024 met with executive directors of nonprofit organizations and members of nonprofit boards to learn more about the challenges and opportunities that organizations face in regard to board relations.

Board recruitment, retention, and engagement were identified as the main issues organizations face.

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Recruitment

The right people in the right seat – both organizations and potential board members need to understand if the role is a good fit. Some strategies that can be used during board recruitment include DISC assessment and surveys, interviews between the prospective board member and current board members, and meetings with executive leadership at the organization. This way, both parties can determine if the candidate is a good fit for the board. DISC assessments can help board members and directors understand how to best interact with each other.

Resources:

For organizations:

- [DISC in nonprofit team building](#)
- [DiSC Styles overview](#)
- [Chief Executive Dos and Don'ts in Recruiting Nonprofit Board Members - BoardSource](#)
- [What Makes a Good Board Member? - BoardSource](#)
- [Board Recruitment: Are you focusing on the right things? - BoardSource](#)
- [Board Recruitment Process - BoardSource](#)
- Board Member Recruitment and Retention
<https://us06web.zoom.us/rec/share/4Heb61DRu-nv0x8guly1o6JDP2hsVOwvO8D7m8oxigrLiMSmuyGvhFToxk5Ehswx.cXXbuI5fV1sKwG GX>

For potential Board members:

- [Questions to Ask Before Joining a Board - BoardSource](#)
- [Joining a Nonprofit Board - BoardSource](#)
- [Board Service Infographic - BoardSource](#)
- Working board vs governing board

Retention

Consistency on a nonprofit's organizations board creates stability for the organization. New perspectives and fresh energy are beneficial; however, frequent turnover can be disruptive to

an organization, causing loss of institutional knowledge, inconsistent priorities, and a feeling of reduced reliability for staff and leadership.

Organizations can retain good board members by running efficient meetings, communicating stories and information about the organization, and train them how to be effective in a particular area they are interested in (i.e. fundraising, advocacy, etc.).

Resources:

- Board Member Recruitment and Retention
<https://us06web.zoom.us/rec/share/4Heb61DRu-nv0x8guly1o6JDP2hsVOwvO8D7m8oxigrLiMSmuyGvhFToxk5Ehswx.cXXbuI5fv1sKwGGX>
- Board and Staff Team Building Exercises
https://docs.google.com/document/d/1LiAZzBomLk4SvhsQYaTpUfSmiwz-vFo3/edit?usp=drive_link&oid=115049092826247586920&rtpof=true&sd=true
- Board Member Check In Template
https://docs.google.com/document/d/1H_2q_rB2sutSTVXZQTn9wC3xYl8HneCJ/edit?usp=drive_link&oid=115049092826247586920&rtpof=true&sd=true

Engagement

By providing meaningful engagement opportunities to board members, they will become effective advocates for the nonprofit organization.

Resources:

- Board Engagement Workshop
<https://us06web.zoom.us/rec/share/FZxPjII1x21Pp-eVP3m-MDFAdXLQX4D4FbzJDntBWSK58p9R3U7CtIhij1lQvMJX.3xvLUhSz5spDEiB6>
- [Effective Board Meetings for Good Governance | National Council of Nonprofits](#)
- Prepping your board for fundraising
https://us06web.zoom.us/rec/share/FLOh2ndLWrhbk90YMHlqLpLUkKjVibw0DltmKaphOvm6Vp_FAFBKC1CwYjjAUih5h.ee54IoMFWg82xgNN?startTime=1689260643000
- Create a Culture of Fundraising Within Your Board
<https://us06web.zoom.us/rec/share/x0y1Kz06OAmzq2anfa1wJPYOxKcSZND-N1QlaAeuEWgBrbSDQU1Ei4-2QjSM9QO.XCfvFgQOE5lvfdi0>

- Board Member Agreement Personal Engagement Plan Template
https://docs.google.com/document/d/1FTU801Lnw5o6CzA0yJrmCoczy5vO8TSP/edit?usp=drive_link&oid=115049092826247586920&rtpof=true&sd=true

Onboarding

A strong onboarding process sets new board members up for success. Onboarding a new member introduces them to the organization, its work, and the other board members and staff with whom they will be working.

Resources:

- Board orientation overview: [Board Orientation | National Council of Nonprofits](#)
- Board orientation checklist: [Nonprofit Board Orientation Checklist - BoardSource](#)

Board Member obligations

Understanding obligations as a board member will help with recruitment, retention, and engagement. Board members will know what is expected of them and how they can best serve the organization through those obligations. Common obligations include fundraising, regular attendance at board meetings, overseeing the executive director, and broad oversight of the direction of the organization.

Resources:

- [Board Service Infographic - BoardSource](#)
- [What Makes a Good Board Member? - BoardSource](#)
- [Board Member Agreement \(councilofnonprofits.org\)](#)
- Community Fundraising E Book
https://drive.google.com/file/d/1H8tdievkqQ1u0F4KPtI0vaAsZzJzNvil/view?usp=drive_link

Sample Policies and Templates

Clear policies are integral to an effective board, providing clear guidelines and a framework for operating.

Resources:

- Sample whistleblower policy: [Whistleblower Protection Policy \(councilofnonprofits.org\)](https://www.councilofnonprofits.org/resources/whistleblower-protection-policy)
- Sample conflict of interest policy: [Annotated Conflict of Interest Policy - Public Counsel](https://www.publiccounsel.org/resources/annotated-conflict-of-interest-policy)
- Sample gift acceptance policy: [Microsoft Word - SAMPLE Gift Acceptance Policies.doc \(nonprofitrisk.org\)](https://www.nonprofitrisk.org/resources/microsoft-word-sample-gift-acceptance-policies.doc)
- Board Agenda Template
https://docs.google.com/document/d/1_vglRW4cIyxPZDXbAuitGMeUBEqLKdnf/edit?usp=drive_link&oid=115049092826247586920&rtpof=true&sd=true

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