

What to Ask Every Prospective Board Member

Excerpt from the second edition of *Over Goal! What You Must Know to Excel at Fundraising Today*

Often, in our haste to meet a deadline for recruiting board members, we whisk through the interview process or skip it entirely, relying on what we know about individuals through other connections or information about them.

Even when we do a proper interview, we tend to focus only on the obvious—expertise, experience, interest in serving on the board. We don't dig deep enough into areas that in the long run are far better indicators of successful board service.

Here are some questions you may not have thought to ask. They will reveal things that can be important to your organization as you build a relationship that you hope will be durable, motivating, and productive.

How passionate are you about our cause?

Passion is the driver when it comes to asking others for money, being an ambassador in the community, or being an effective advocate. In attempting to fill out a recruitment matrix (banker, corporate vice president, community volunteer) we shouldn't overlook the passion dimension.

One arts organization, in its quest to form a more "corporate board," recruited a number of corporate superstars but failed to test for passion. Little money was raised other than what came almost by courtesy from the member's corporations. There was little participation at concerts and events. And ultimately some decisions were made that were harmful to the organization. Why? Because the passion factor was lacking.

How much time can you give to us?

This is critical. To slide over this question, hoping the individual, when confirmed, will make time when we need it is unrealistic. One university, when enlisting volunteers for a capital campaign, was savvy enough to put the time requirement at the bottom of every volunteer job description. When volunteers committed to the job, they knew it would take (e.g.) two hours a week.

While some board members may be enlisted because they offer a connection or a presence that could be more important than time, most board members are enlisted to serve. And serving requires time.

Setting time standards is one of the ways we convey the importance of our organization to volunteers.

What motivates you as a volunteer?

This is an important question to ask in initial conversations. You want to know what will keep this person engaged over the years of his or her board service.

The best answer will come when you query the candidate about his or her previous board or volunteer service. Which organizations provided the environment in which the volunteer flourished, and which ones did not?

A direct question about what motivates a candidate can also work, but not as effectively.

You're trying to match board nominees to the culture and practices of your organization—be sure yours is an environment in which the candidate will be motivated.

What expectations do you have from the management of organizations on whose boards you serve?

This, too, is important to know. We evaluate each other and organizations on expectations we sometimes fail to communicate. These expectations can be as granular as wanting to receive board materials at least a week before meetings or as global as only serving on boards of financially stable organizations.

If the person's expectations are unrealistic or don't align with where your organization is at present (e.g., you are dragging around a \$70,000 accumulated deficit), then it's better to find that out in the recruitment process.

In your enlistment conversation, you can, for instance, be candid with the candidate about the deficit, why it exists, and your plans to eliminate it, and let the prospective board member decide whether he or she wants to serve.

What are your personal dreams or aspirations that could be enhanced by service on our board?

Younger board members often view board service as a way not only to serve but to gain connections and experience that will advance their careers. Similarly, there are individuals seeking board positions who are looking to make career changes, learn new skills, or learn more about the nonprofit sector.

To meet these needs, you must first learn what they are. But, as importantly, you must keep them at the front of your mind during the board member's term of service. In this way, you'll encourage people's growth and participation in our sector or give the board members experiences (marketing, writing, speaking) that will advance their careers.

You set up a win/win situation and deepen the board member's commitment to and appreciation for the organization.

What professional or personal constraints on your time or service might you anticipate?

The people we want are often the same people everyone else wants to recruit. They may already serve on other boards or have demanding, high-profile jobs. In addition to the time constraints, this situation creates attention constraints.

In one organization, the co-chair of the development committee was asked by another organization on whose board he served to chair their endowment campaign. Although he had plenty of time to give, it was soon apparent that the endowment campaign was getting much more of his attention and energy. The other organization found itself without his previously significant involvement.

An in-demand board candidate should be candid about where your organization fits among his or her philanthropic priorities and whether being chair of another organization's board or project will be too distracting.

Your choice, then, is to enlist anyway, in the hope you will gain the prospective member's attention, or to delay enlisting until a future time in which the candidate will have your organization as a higher priority.

Are you willing to make a financial commitment that is a stretch?

We are getting better at putting this question on the table, but still we falter. We have to be up front about our expectations of a board member's financial commitment. As with time, financial support is an expectation we need to communicate clearly.

While I'm not an advocate of a "minimum board gift" (believing we not only drive off people who can't give the minimum but allow those who could give more to give less because the "floor" becomes the "ceiling"), I am a firm advocate of 100 percent board giving at a level that is a stretch.

What is a stretch? It is a gift that is larger than the gift a person might otherwise give. Let people know at the outset that you expect them to give at this level. If they use the "time is money" response, reconsider their appropriateness as a board member.

Of what importance to you is social interaction with other board members?

Some boards have a culture that encourages frequent opportunities for social interaction; other boards feel this is unimportant. This is another aspect of the "match."

A board recruit may barely have time to come to meetings and serve on a committee or two, let alone feel obligated to socialize. When a person doesn't want to mix philanthropic service with his or her social life, it can create an awkward situation with other board members.

A person who fails to attend board social events may never be fully embraced by the other board members. Likewise, if a person is seeking not only a volunteer experience but a social experience and your board's culture is not social, there may be a problem.

How do you feel about performance evaluations of individual board members and boards as a group?

Board member (and full board) performance evaluations have become more routine. Experienced board members may expect evaluation or they may feel that it's useless, a waste of time, or inappropriate.

Explore their knowledge of the process and listen for potential objections if it's your practice to evaluate formally on an annual or biannual basis. Some organizations have adopted the practice (which I encourage) of having the CEO and the board chair meet annually with each board member to thank them for their service, review their concerns, find out their committee or project preferences, and to ask for their gift.

If this is something you're doing, let each board recruit know during the enlistment process about that annual meeting. That way, he or she won't be surprised when the board chair calls for an appointment.

As you think about the three primary board roles—ambassador, advocate, and asker—in which role(s) do you think you will want to be most active?

This is the "capstone" question—it allows potential board members to see how you have organized board involvement and where they fit in. It opens their imagination to ways they can serve that fit their own goals and motivations and best utilize their experience and community contacts.

With this delineation, you offer many ways to get involved, though of course it's always good to say that the goal is for board members to fulfill all three roles!

Conclusion

These questions should give you a much more detailed profile of your board recruit and provide better information on which to build a productive and mutually fulfilling relationship.

Like hiring an employee, we need to get beyond the obvious information and find out what really motivates a potential board member. Then our job—the even more important one—is to make sure we remember these motivations as we assign, coach, engage, and reward board members.

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