

Ten Steps for Strategic Trustee Recruitment

For maximum strategic impact, Friends school boards may want to consider adopting a form of the following stepped process, which targets recruitment keyed to strategic objectives – first identifying the skills, capacities, and resources they need, and then cultivating individuals who can bring these skills to the board table:

1. At a board meeting or meeting of the governance committee, look ahead five or more years. List the school's most important strategic needs.
2. List the skills, capacities, and resources the board will need to fill those strategic needs. Focus on the skills, capacities, and resources that prospective trustees could bring to the work of the board from their job or life experience.
3. Brainstorm a long list of the jobs that might produce the kinds of skills, capacities, and resources needed, then brainstorm names of individuals with experience in those jobs that might be asked to serve on the board or co-opted onto committees.
4. Now look at the membership particulars: number of trustees needed, names and skills of trustees rotating off, desired goals for membership balance (Quakers, gender, race, parent/alum, etc.).
5. Keeping a) strategic goals, b) skills, capacities, and resources needed to accomplish those goals, and c) membership particulars in mind, begin creating a "short list" of candidates who can best fill all requirements. Add in some alternate names.
6. Present the short list to the full board for review, discussion, and approval. Remind the board that every part of this process must be held in the strictest confidence. Most boards give this part of the process two board meetings – one to present the candidates and one to approve the list, with the time in between meetings used to think and to solicit important information about candidates that may be known by individual trustees. In between the meetings, a member of the committee is designated to receive positive as well as cautionary information in a private manner (in person or by phone, not e-mail).
7. Once the short list has full board approval, decide for each candidate whom among the committee would be the best person to a) invite them into membership and b) discuss the roles and responsibilities of trusteeship. Designate one person (perhaps the clerk) to be the holder of the master list, keeping track of "yes" answers and when you get "no" answers, giving the go-ahead for asking alternates.
8. Schedule a time for a personal, in-person meeting with each candidate, preferably over a meal. If distance is an obstacle, schedule a phone meeting. Resist the pull to invite a candidate into membership via letter or e-mail, as this misses the opportunity for building relationship and school spirit.
9. Use a "talking points" sheet to structure your discussion with each candidate, so all are given the respect of receiving the same, full information. Be sure to include:
 - A warm invitation to join you in service on the board, stating why they were nominated
 - Share your own enthusiasm for the current work of the board and the school
 - A description of the current strategic initiatives of the school
 - Review of the important contributions you're hoping this person might make to those initiatives; discuss the possibilities and ask about their interests
 - Articulation of the financial responsibilities of board membership
 - Expectations for board service (number of board and committee meetings per year, expected attendance, process if absence is unavoidable)
 - Warm thanks for considering this important service to the school
10. Allow some time (a week or so) for the person to consider the invitation.

- a) If a “yes” answer is received, report the good news to the holder of the master list.
 - b) If a “no” answer is received, see if the candidate is open to discussing other possibilities, including possible future service or co-opted committee service.
 - c) If the answer is “maybe,” find out what information and how much time would be needed to come to a firm decision. Report this to the holder of the master list, too.
11. Continue the process, reporting results and discussing next steps within the committee, until you have a full roster. Convey the good news of final results to the full board.
 12. Schedule a full orientation for all new trustees.

Key things to remember:

- All lists of names – the long list for use just within the committee and the short list to be shared with the full board – must be kept in complete confidentiality. To prevent a nightmare of insult and hurt feelings, no one must ever learn that their name is – or is not – on one of these lists, until the moment that they are invited into membership.
- Keep the “long list” going for many years, adding and subtracting names as time goes on. Some names on the list may be people to watch and cultivate, who are not yet ready for full trusteeship, but who seem to have strong potential.
- Deciding which new trustees to bring on to the board is one of the most important decisions, on which rides the future success (or failure) of the board and the school; it should always follow the full process decided upon in advance. Be careful not to extend invitations for trusteeship without going through the full process, which may include the full agreement of the board prior to the invitation.
- If the school does not have a written policy containing the steps for selection of new trustees, such as the one detailed above, consider creating one.