



A Strategic Approach to Board Development

Have you been in this situation at a board meeting?

The Board Chair announces that Tom and Jane are rolling off the board in June and we need to find two new board members. Everyone looks around the table at each other for a few seconds, and then people start listing off names of people, some you know, some you don't.

It is not necessarily a bad way to do it, but there is a more strategic way to approach the situation that helps assure you have a strong board in place that is in a good position to do its work in a successful and productive way.

First: it is helpful to take a scan of the strengths and gaps on your current board – through the lens of what a board is supposed to do:

- Financial oversight – people with a background in finance like accountants, bankers, or financial planners that can assist the board and staff with understanding the organization's finances, the impacts of financial decisions and can serve as your treasurer
- Strategic direction – people with expertise and who are passionate about the issues your organization tackles
- Fundraising – people who are well connected to sources of funding and/or who are great fundraisers themselves
- Leadership – people who have experience in leadership positions, making decisions in a collaborative way, and harnessing the strengths of individuals to make a collective, collaborative impact and that can also serve in leadership positions on your board such as the Chair, Vice Chair, and Secretary
- Decision-making – it is helpful to have a lawyer on your board (especially if you can't afford to have in-house legal counsel) to help the board and staff ensure that the organization is in compliance with federal, state and local laws and that you are following the rules that govern your organization, i.e. your by-laws. They can also help the board make decisions related to litigation (if you do that kind of thing).
- Ambassador – people who are connected in the community you operate in, who can open doors and opportunities, and use their network to help the organization
- Diversity – it is important that the people on our boards are representative of the community we seek to serve. We all have our own perspectives based on things like our age, gender, race, culture, socio-economics, politics, and sexual orientation – just to name a few. Having a diversity of people who represent different points of view helps ensure our plans and decisions reflect the community we serve.

Chances are that many of your current board members fit these needs, but doing a scan will help you identify your gaps. Also, look for any gaps that may be coming down the pike as board terms expire.

Second: Make a list of prospects. Now, it would be easy to look at your gaps and start naming names of lawyers, accountants, and leaders you know. But, there is an important lens to look at your gaps through to make your list of prospects:



- At the bottom is the “*Participants/Members*” block: this is where you have the most people and these are the people who join your organization as a member, participate in your programs, projects and events.
- Above it is the “*Volunteers/Donors*” block: you create this block by engaging your members or participants in a greater level of involvement by asking them to volunteer or donate to help with a piece of one of your programs, projects, or events.
- Above it is the “*Super Volunteers/Major Donors*” block: you create this block by engaging people who volunteered (or donated) for one of your programs, projects, or events AND demonstrated leadership potential. You engage them in a new level of involvement by asking and empowering them take on a leadership role in (or make a significant donation in support of) one of your programs, projects or events.
- Above it is the “*Board*” block: you create this block by engaging the people who have demonstrated leadership and commitment to your mission by taking on “*Super Volunteer*” or “*Major Donor*” roles into roles that provide the leadership and direction for the entire organization.
- The top “*Leadership*” block: this block is created by engaging people who have demonstrated leadership and commitment by providing leadership and direction for the organization as board members into roles that provide leadership for the board and the organization as a whole.

Using the leadership pyramid as a framework for leadership development in your organization allows your people to progress through logical phases of leadership development and ensures they are ready and suited for the next phase of leadership.

By assessing the gaps in your board and using the leadership pyramid to identify appropriate board member prospects, you ensure that your board is comprised of people who understand your organization and its mission; have demonstrated their commitment to it; represent the interests of the community you serve; and possess the expertise you require.