



Transform Nonprofit Governance with Open Board Search

A step-by-step approach to cultivating diverse boards
using a public recruitment strategy

Only 38% of nonprofit executives feel their boards represent the communities they serve, and 66% of executives expressed dissatisfaction with their board's racial and ethnic diversity (Reviewing the State of Diversity, Equity, and Inclusion on Nonprofit Boards 2021, BoardSource's Leading with Intent).

We are convinced that open board searches are the most effective way to diversify boards. In contrast to a closed or invitation-only board recruitment process, an open board search taps into new, previously unknown networks of talent through public announcement and active recruitment and encourages candidates who are less familiar with the organization to submit applications for screening and evaluation.

The Imperative

According to BoardSource, the top two methods for identifying potential new board members are “board members’ personal or professional networks” (96%) and “CEO/ED’s personal or professional networks” (88%). These networks tend to overlap with similar individuals, inadvertently creating an insider-centric culture.

The main issue with operating this way is that it reinforces the status quo of the board. To build resilience in the face of problems that are complex and ever-changing—like pandemics and climate impacts—boards need diversity in all senses of the word and must be inclusive of people from different socioeconomic backgrounds, races, geographies, genders, orientations, and skills.

A public, open board search is an opportunity to express exactly what you are looking for in a board member and open the doors to anyone interested in contributing to your organization through a structured process. This approach brings members of the public to the forefront, who can activate undiscovered networks and attract talent on your behalf. These innovative searches hold the potential to bring in fresh board members, but they can also establish a pipeline of support across committees, task forces, volunteer programs, and other channels.

The visibility created by this process can inspire even more communities to see themselves as relevant to your organization and your board. Undertaking an open board search communicates your commitment to transparency and inclusivity while bolstering your organization's brand identity. It is a public proclamation of who you are, what you value, and your vision for the future. It effectively targets potential candidates and elevates your presence within the communities you wish to connect with—whether or not these individuals ultimately join your board.



The Steps

Open board search commits organizations to five key steps:

1. *Actively choose open board search.* Recognize the need for change, gain board leadership buy-in, establish a roadmap, and inspire trust in the process.
2. *Prioritize “culture add” over “culture fit.”* Determine the holistic diversity of skills, connections, and lived experiences that foster an ideal board culture.
3. *Market and publicize the search.* Create a position specification to use as a thoughtful marketing tool, target and “test” candidates, and expand the board’s usual networks to conduct search outreach.
4. *Process applicants with intention.* Follow thoughtful screening and interview processes that address bias and are grounded in “culture add.” Provide a high-touch relationship with candidates by communicating consistently and meaningfully throughout the process.
5. *Think creatively about onboarding.* Bring your intentional process to a close with careful evaluation and final decision making, thoughtful onboarding practices, supportive mentorship and co-learning opportunities, and continue to engage candidates who were not selected for board membership.

1 | Actively Choose Open Board Search

Step One is to recognize the need for change, gain board and leadership buy-in, establish a roadmap, and inspire trust in the process.

Recognize the Need for Change

Perhaps board recruitment practices are misaligned with diversity goals, or there are known key attributes absent from the board that could otherwise advance the strategic agenda. When board members and staff leadership agree on the need for change, an open board search offers an effective way to change course.

Tom Stolp, Executive Director of Ozaukee Washington Land Trust, is completing an open board search.

"We recently completed a justice, equity, diversity, and inclusion program that opened our eyes and minds to the importance of having leadership that better represents the full diversity of the community we serve. Our board recognized that pulling from the same social circles, from the predominantly white communities where we focus our land protection work, had led to limited perspectives. If we wanted a new result, we needed to take a new tack."

Cultivate Buy-In

Full board buy-in and enthusiasm is crucial, as invested leaders will be active participants in recruitment, screening, and decision-making. Multiple conversations should be held with the board and staff leadership about the open board search process to discuss the potential benefits, challenges, and work required. The months-long process of an open search will inevitably uncover some needs for clarifying your intent with your existing networks and exploring new governance practices to build a space of welcoming. Consistent and transparent communication with the organization's stakeholders helps to ease any concerns prompted by these issues.

“With any new process, there are going to be questions and concerns. The key was ensuring the board fully engaged with each other on the topic and that all opinions were heard. When individuals saw their feedback was incorporated, it lowered worries and got people excited to spread the word.”

Walter Moore, President of Peninsula Open Space (POST) conducted an open board search in collaboration with Potrero Group in 2022.

Establish a Plan

An open board search can be conducted in-house or in collaboration with external consultants. The best route may vary based on the nuances of an organization, time, capacity, budget, and connections. No matter the route taken, we recommend designating a **search team ad hoc committee or task force** to drive the initiative forward throughout, make clear objectives for the process, and plan for roadblocks.

2 | Prioritize “Culture Add” Over “Culture Fit”

Step Two is to determine the holistic diversity of skills, connections, and lived experiences that foster an ideal board culture.

Leave the Matrix Behind

Boards often invest countless hours constructing matrices and cajoling busy board members to reduce their contributions into tidy boxes like “finance,” “law,” “marketing,” and similar categories. While it is important to engage in conversations about the requisite qualities for the board, we advise against relying solely on a grid to gauge needed skills. This process can yield valuable insights, but it diverts attention away from the more important dialogue centered around fostering an ideal board culture and recognizing the multiple contributions new members can and should make. While shaping the culture might encompass identifying specific skills, its scope is larger and more powerful than individual proficiencies or demographics.

Focus on Holistic Diversity

We recommend a departure from matrices and instead focusing on holistic diversity and board culture. Diversity is often confined to a single, narrow category, yet within our organizations and workforce, diversity encompasses not just skills but networks, leadership styles, personal approaches, and lived experiences. We seek to find candidates that embody a "culture add" rather than "fit." The latter term implies alignment with existing norms, while "culture add" emphasizes the potential to contribute to the growth and evolution of the organization's culture over time. We strongly encourage you to dedicate ample time to holistic board evaluation—arguably the most in-depth phase of the entire search process.

To discover opportunities for "culture add," facilitate and engage in critical discussions with an array of board members, committee participants, staff leaders, and external stakeholders based on your partnerships. These dialogues serve multiple purposes: they use a qualitative approach to assess potential gaps and needs and uncover ideal attributes, skills, and strengths of candidates, the strengths of the board's existing culture, assess what holistic diversity translates to for your board in particular, and brings to light new communities and professional sectors that could pipeline talent.

Angela West Blank, Executive Director of Groundswell Conservancy, conducted an open board search in 2023.

"We used the traditional board composition chart in the past, but this time we were really looking for different people with different types of attributes, styles, backgrounds, and diverse experiences. We went beyond basic skills and asked our board about personal style. We wanted to know: Are you a consensus builder? An implementer? A motivator? A visionary? We wanted to get a mix."

Prioritize Candidate Qualities

By the process's end, you should have a shared vision of desired attributes, skills, and strengths of prospective candidate personas. These qualities can encompass diverse aspects such as leadership styles, professional experiences, network affiliations, community connections, or other attributes.

The search task force should prioritize candidate qualities. Distinguish between “must-haves”—qualities you’re unwilling to compromise on—and “nice to have.” This allows you to target key individuals but still have room to be open to candidates who have much to offer. The search task force needs to be able to articulate their search criteria when publicizing board positions and share a clear understanding of the criteria when evaluating prospective applicants.

3 | Market and Publicize the Search

Step Three is to create a position specification to use as a thoughtful marketing tool, target and “test” candidates, and expand the board’s usual networks to conduct search outreach.

Marketing the Position Specification

We recommend working with a consultant or your organization’s marketing team to develop a robust and visually appealing position specification for public release. This specification serves as more than just a job description; it is a dynamic instrument that communicates not only the search attributes, roles, and responsibilities but also the organization’s values, aspirations, and the impact a new board member can make.

We urge our clients to set high expectations when describing your board and priority candidate attributes. High-caliber individuals are drawn to organizations that present board service as a chance to make a significant difference and contribute their expertise rather than merely plug skill gaps. Investing in a professionally designed position description signals the seriousness of the position and the thoroughness of the selection process, which helps attract quality individuals.

“We spent a lot of time thinking about the language of the position description. We made it very clear whom we were looking for, so the people who were receiving the position description would take a pause and really think about it before applying ‘just because.’”

Angela West Blank, Groundswell Conservancy

Outreach Tactics

A common misconception about open board searches is the assumption that personal networks won't be leveraged. In fact, open board search can build out and amplify existing networks and make those connections work for your organization in new ways. You will find your contacts motivated by your call to action; they will think more deeply and extend their reach.

Through these efforts, it's important to seek to engage in outreach with communities and networks that are traditionally underrepresented in the boardroom. This necessitates a focused strategy involving intentional requests made to board members and other stakeholders to bridge connections and form links with these communities. Furthermore, conducting targeted messaging on digital platforms, such as LinkedIn or community boards, can increase the likelihood of discovering candidates with diverse perspectives, backgrounds, and experiences and amplify the precision of your candidate search.

"We engaged everyone. Firstly through our board and staff, and then our partner groups that were more racially and economically diverse. It was a team effort—we had volunteers reach out to people and organizations, we had lists of different groups, emails, social media, and website posts, and advertisements targeted to BIPOC audiences and media outlets. We reached out broadly to groups we didn't know well and directly to individuals we thought would make particularly great applicants. It worked out well; we had more candidates apply than we expected, and that output felt great."

Angela West Blank, Groundswell Conservancy

We recommend using both formal and informal outreach tactics. Formal application announcements, disseminated through various channels, draw the attention of a wide range of potential candidates who may not typically consider such positions. Simultaneously, personalized outreach efforts initiated by board members and leadership help to cover all bases and increase the rate of response of potential applicants. Traditional methods of activating networks, such as email outreach and search postings, remain effective. We encourage our clients to embrace the digital landscape and use social media platforms like Instagram and LinkedIn as more dynamic avenues of outreach.

Craft Sample Candidate Personas

Finally, we recommend crafting sample candidate profiles and personas to ensure accurate candidate targeting. This involves creating examples of candidates, inclusive of attributes such as their origins, board involvements, life experiences, industry engagements, and leadership approaches. Introducing a set of candidate personas to the full search task force or other decision-makers as “test” candidates can generate insightful conversations about candidate backgrounds and attributes and how new board members could work together as a cohort.

4 | Process Applicants with Intention

Step Four involves thoughtful screening and interview processes that address bias and are grounded in “culture add.” Equally important is a high-touch relationship with candidates that employs consistent and meaningful communication throughout the process.

Mitigate Bias Through Training

We prioritize the implementation of implicit bias training across all our searches to uphold the search task force’s commitment to impartiality and retain the integrity of the selection process. We recommend that the search task force equip themselves with training and tools to conduct interviews and evaluations with a keen awareness of unconscious biases that may influence decision making.

Craft Evaluation Criteria

Using insights gained during both the exploration of desired board attributes and implicit bias mitigation techniques, the search task force should craft tailored evaluation criteria to assess a candidate’s ability to add value to the board. The criteria extends beyond mere technical competencies and delves into how a candidate’s unique perspectives and experiences align with the board’s overall mission and can contribute to “culture add.” We strongly recommend our clients employ a standardized evaluation rubric that guides candidate assessments.

Olivia White Lopez, POST's Director of DEI, employs evaluation criteria as a mechanism to mitigate bias.

"We made sure we had a rubric that we evaluated all our candidates against because it's common to go through an interview process adjusting what's important based on a personal connection. People will often lean in one direction or another based on their own backgrounds, preferences, and perspectives. Standard evaluation criteria help the team collectively agree on which attributes are most important and how to measure them before going through the screening process."

Interview Considerations

The interview phase is an important opportunity to assess "culture add." We encourage search teams to offer at least two rounds of interviews to provide ample opportunities for candidates to share how their lived experiences inform their potential in the role.

Practicing thoughtful, inclusive language and using standard interview protocols and evaluation criteria during these interviews will uphold consistency and equity and ensure uniformity in candidate assessments. We recommend that search teams offer opportunities for candidates to list their pronouns, self-identify as a person with a disability, share any accessibility needs, and offer accommodations for candidates who require them, such as flexible scheduling.

Ensure all candidates have the opportunity to interview you! Reciprocal interaction not only reinforces the search team's commitment to transparency but also empowers candidates to explore the board's culture, values, and objectives and allows them to assess their own compatibility with the organization.

High-Touch Communication

Integrated throughout this step is the facilitation of consistent, transparent, and nuanced communication with all candidates. This includes but is not limited to providing timely updates, expressing gratitude through thank-you notes, and offering opportunities for informational interviews (to avoid bias, make sure that candidates know this is an opportunity for them to ask questions, not discuss their candidacy). A high-touch approach fosters a sense of respect and gratitude for each candidate's investment in the process and contributes to a heightened sense of trust and mutual understanding. Ensuring candidates feel valued and heard

regardless of the final outcome contributes to a culture of equity and dignity, and keeps the door open to further engagements with your organization.

"We had over 50 people expressing deep interest in what we do, and so we made a strong point to make sure that we were carefully handling and being available to our candidates. Even if they didn't make it, we circled back and were very clear, respectful, and appreciative of their time."

Walter Moore, POST

5 | Think Creatively About Onboarding

Step Five culminates an intentional process with careful evaluation and final decision making, thoughtful onboarding practices, supportive mentorship and co-learning opportunities, and continued engagement with candidates who were not selected for board membership.

Selecting a Cohort

Selecting a cohort of new board members, rather than just one member at a time, holds immense strategic significance in that it facilitates a holistic shift in the board's dynamics. A cohort approach nurtures a culture of collaboration and knowledge exchange, as new board members entering as a part of the cohort can learn from one another and collectively contribute fresh insights to ongoing initiatives. This collaborative dynamic not only accelerates the learning curve for new members but helps drive innovation and transformative change for the board.

"We were intentional in bringing on a cohort because we wanted to make sure a person wasn't standing in isolation, especially if they didn't have board experience."

Walter Moore, POST

Crafting a board cohort demands a thoughtful allocation of time, and we encourage our clients to engage in multiple, dynamic decision-making meetings to thoroughly discuss interview findings and collectively weigh the attributes, experiences, and potential contributions of candidates.

It's important that these deliberations not only consider diversity within the board but also the composition of the incoming cohort. A balanced approach will help ensure that new board members not only offer needed "culture add" to the board but complement one another.

Reference Checks

We strongly recommend the search task force conduct reference checks and social media scans of final nominees considered for board placement, both as a method of due diligence and to maintain the integrity of the selection process. Not only do reference checks safeguard against any potential misrepresentations or inaccuracies, but they play a crucial role in assessing candidates' interpersonal skills, team player attitude, and ability to work effectively with others, all of which will contribute to collaborative and respectful interactions with the board.

Engage Candidates in Other Opportunities

One of the wonderful aspects of an open board search is the discovery of people who are passionate about your organization and mission, even if they may not be the right additions to the board at this time. All applicants are now potential promoters of your organization, and we encourage search teams to treat each candidate as a friend and supporter to be "onboarded." Take the time during decision making meetings to consider these candidates for other opportunities, including committee placement, donor or advocate roles, and volunteer roles. You can always leave the door open to future placement by keeping candidates in the board pipeline.

"We were really intentional with how we met and dealt with the candidates who came through our pipeline. It takes some time, but we reached out to all of them in specific ways, whether they were part of the cohort or not, to see if they were interested in committees or volunteering. I think there was a big concern that there was going to be some negative pushback if they weren't selected. Fortunately, there was none! They supported us and our organization."

Angela West Blank, Groundswell Conservancy

Thoughtful Onboarding for New Members

Successful onboarding sets the stage for new board members to smoothly integrate into the board's culture and understand their roles and how they can best engage. We recommend several onboarding strategies to our clients, including a culture-building board retreat, mentorship, and a comprehensive review of board policies and documents.

"We selected five people to our board, and the first thing we did was throw a party for them! It was completely social, and people loved it. We also asked new members to audit committee meetings and gave them time to choose which committee they'd like to serve on."

Angela West Blank, Groundswell Conservancy

A full-day or multi-hour board retreat following the selection of a new board cohort fosters a sense of community and shared purpose among new and existing board members. It provides an opportunity for individuals to connect on a personal level, build relationships, and form a strong foundation for collaborative interactions. New members not only gain insights into the organization's strategy but generate a collective camaraderie.

Thoughtful assignments of board mentors, or "buddies," to new board members help guide and support the transition into their roles. Mentors act as friendly and consistent touchpoints that can help share institutional knowledge, connect members, and provide a platform for candid conversations about board dynamics, expectations, and best practices.

"We connected our cohort within the board through a mentorship program, where each person had a 'buddy' to check in with and connect with. Also, our cohort attended our full-day board retreat, and it was a great way to get a basis for our organization. We've also been doing a number of consistent activities with the cohort, from property tours to social events to our donor events."

Walter Moore, POST

Robust onboarding materials in the form of board policies, documents, strategy, and any other contextual documentation can help new board members gain a clear

understanding of the organization, their responsibilities, and opportunities for engagement and contribution, amplifying the voices that have been meticulously selected to enrich the board.

Final Thoughts

The journey toward a more diverse and inclusive nonprofit board begins with a deliberate decision to embrace change and actively seek out new voices and perspectives. The open board search process offers a transformative pathway to achieving this goal, enabling organizations to build boards that are not only reflective of the communities they serve but also well-equipped to navigate the complex challenges of our time. By making the choice to embark on an open board search process, organizations can unlock the full potential of their boards and create lasting positive impacts on their missions and communities.

"This is one of the most exciting things we've done in a long time. We really decided to push ourselves to think out of the box. This more transparent open board search made all the difference. We really benefited, and our board and staff are just thrilled with our results."

Angela West Blank, Groundswell Conservancy

For more information on Open Board Search, contact us at info@potrerogroup.com.



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