

# RECRUITING BOARD MEMBERS

By Michael Sessions, PhD, SVP



**Someone recently said to me: “Recruiting board members? I thought recruiting is what boards did when they looked for a CEO. I had never thought about finding new board members as ‘recruiting.’”** But boards are responsible for more than filling the CEO position — they are responsible for finding and training new board members.

Board succession planning is a process that requires intention, attention and effort. It’s about putting systems in place to ensure that the right people are in the right place at the right time. It means aligning the strategic and governance needs of the board with the talent required to carry out those needs. This is the duty of the board, not staff or management.

It’s not enough to find good people. Board members must be educated so that they understand the credit union, policy and governance before they begin voting. The transition should appear seamless and not disrupt the credit union or board’s function. This requires forethought and planning to ensure that recruitment and new member orientation policies remain active.

## **Recruitment Tactics**

Two recruiting methods exist: One is open and the other is closed. Open simply means you announce positions in the newspaper or on your website. We know of credit unions that openly advertise for board positions. They receive numerous responses from a diverse group of members and are able to solidify good candidates.

Other credit unions believe open recruiting is problematic. They find that vetting and qualifying members for a board post can be difficult. Turning away or turning down members, they suggest, has unintended negative consequences. These credit unions prefer that board members keep their eyes open for members who might be qualified and have an interest in serving. Names are forwarded to the secretary, who keeps a running list.

Closed recruiting takes place when the open position is not announced publicly. We have found that a closed process tends to produce candidates who are “like me.” People who are known and are liked are more apt to be recommended. With the demographic of credit union boards being predominantly white males 61 years of age, it is important to be intentional about the process you undertake and the outcome you hope to achieve.

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## Steps to Success

It may take longer than anticipated to recruit, vet through the nominating committee, approve through the entire board and orient a new board member. Our experience suggests that it takes about one year for a person from recruitment through orientation — including learning governance and building familiarity with the implications of policy — to the moment they feel fully informed when it's time to vote.

Your membership relies on each board member to function properly at all times, even in the event of unplanned departures. To make this happen, follow these steps:

- Add succession planning to your board agenda.
- Talk about diversity.
- Consider an open versus a closed process.
- Decide on what a person must know before voting.
- Sketch out a timeline for the entire process.
- Consider unplanned board departures.
- Write a policy on board succession.

If you do this, you will have started down the road of giving board succession the intention, planning and effort your members expect.

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