GUIDE FOR NONPROFITS

Maximizing Your Effectiveness in Finding the Right Board Candidates

Completing your **Online Profile** at www.boardnetusa.org is a critical component of connecting with a potential candidate.

Please consider printing out this guide to help you in filling out your profile.

Step 1 – Register

You will need to have your organization's EIN (tax identification number) and ruling year of your 501 (c) (3) status to register. If you have any problems with this first step, please call our office at 919-294-9803.

Step 2 – Completing Your Board Profile

To complete your Board Profile:

1. Once you have your registration completed, login to boardnetUSA and click on the **My Profile** button on the left side of the screen.

2. boardnetUSA should prompt you to complete your profile at that point. There are seven main sections to complete, from **Org Information** down to **Search Status**. After filling in the appropriate information for each section, click on the **Update** or **Add** button to move on to the next search.

3. To make changes or updates to your profile at any point in the future, simply login and click on **My Profile**, then click on the appropriate tab on the right side of your profile. Be sure to click **Update** once you have made the changes!

One of the most important sections of the Board Profile is the **Board Development Plans** part of **Search Status**, which appears close to the top of your profile when viewed by candidates. The instructions state, "Describe how you plan to develop your board through the addition of new members." Some questions you might consider addressing in this section include:

- To what projects or committees could a board member commit his/her time and energy?
- What is the board's current composition (parents, educators, artists, etc.) and how is the nonprofit using Triangle BoardConnect to expand?
- What upcoming events or annual events do board members help to plan and execute?
- What skills is the board seeking?
- Is the nonprofit experiencing any special challenges a particular candidate's skills could help to address?
- How does this nonprofit contribute to the community? Why would a new trustee want to be involved?

Example: We have space on our board for three additional people. We are specifically looking for people skilled and interested in working on fundraising and PR with our Development Director, as well as other staff and board members, and volunteers. Our organization must develop an annual campaign and a marketing/PR plan. We are quickly outgrowing our office space, so are thinking about other options with regard to space. Through the addition of new members, we hope to develop a more active board that is willing to assist staff in carrying out the mission either through the donation of time, money, talent, or a combination of these.

A Nonprofit Sample Profile is available as a link on this website. After you have completed your profile, we recommend that you compare it to the sample and complete items you might have overlooked.

Step 3 – Creating Board Openings

Important: You must create at least one opening to have your Profile and Board Opening accessible to prospective Candidates

To help focus your search, you'll want to create specific **Board Openings**. Use this function to advertise specific "job openings" for your board. For example, you would create three different Board Openings if you are seeking finance, legal and marketing skills. You might title these *Board Treasurer, Legal Expert and Marketing for Board*, respectively.

Following are step-by-step instructions for creating a Board Opening on boardnetUSA:

1. After logging in at www.boardnetUSA.org, select the **Find a Candidate** tab located on the left side of the screen.
2. Select **Post or Announce a Board Opening**.
3. Read the instructions, then select the **Add** button (found on the bottom right of the screen).
4. Scroll down to the first of two red-outlined boxes:
   -Enter a title for the position: e.g. Board Treasurer, Legal Expert, etc.
   -Enter a description of the board opening: Select **View Examples** for ideas on how to describe your board opening.
5. Go to the second red-outlined box. There are two sections to this box – **Skills** and **Service Interests**:
   -Skills: Enter a maximum of three skills needed to fill this Board Opening.
   -Service Interests: By default, the Service Interests you listed in your profile should already be selected.
6. Once you have completed the two red-outlined boxes, click on the **Save** button found on the bottom right. You will be directed back to the *Post or Announce a Board Opening* page, where the Board Opening should now be listed.
7. Click on the **edit** button associated with the Board Opening just created.
8. Select the **Active** check-box (found near the top of the page), then select the **Save** button again.

Your Board Opening should now be listed as Active. You can create, edit or change the status of any Board Opening at any time. We suggest you have no more than three Board Openings active at a time, for a couple of reasons. First, you do not want to come across to a candidate as if you are desperately in need of board members. While some might view this as intriguing, most will not. Second, after you complete your composition analysis, you should prioritize your needs in order to address the board's most pressing issues and concerns. Post the top two or three on boardnetUSA – once one position is filled, replace it online with the next position on your priority list.

Step 4 – Proactively Searching for Candidates

You can wait for candidates to contact you based on your profile and Board openings, or you can contact candidates directly. In order to maximize the effectiveness of our program, we recommend that you do both.

The initial contact with a potential board member is often the most important. Board service is a big commitment, and newcomers want to be welcomed by current trustees with professionalism and warmth. Contacting candidates directly through the online interface is one way to initiate a conversation about board membership. Following are step-by-step instructions for candidate searching on boardnetUSA:

1. After logging in at www.boardnetUSA.org, select the **Find a Candidate** tab located on the left side of the screen.
2. Select from the following search options:

Candidate Search – Search boardnetUSA's database of candidates by city, state, interests, and other specifications. This is the broadest and most flexible search function available. **Recommended – put in your zip code and a 50 mile radius to explore all candidates.**

- Use the **Enhanced Search Form** link found near the bottom of the **Candidate Search** screen to incorporate a larger number of parameters in your search, which will result in more focused search results.
- **Perform Candidate Match** – Match your profile with candidates in your local area. This method uses the desired skills and interests directly from your nonprofit's profile – you need not select manually from a list or characteristics. The results are categorized by the percentage of skills shared between the candidate and your nonprofit profile.
- **Announce or Post a Board Opening** – To announce a board opening once you have created it, click the **send** button. The send button will only appear on active openings. To make an opening active select the **edit** button and place a check in box next to **Active.** Announcing your board opening will send your posting to up to 200 candidates and the board opening will receive priority positioning in the board search results for two weeks from the date the emails are sent. Any responses to posted or announced openings will arrive from **candidate@boardnetusa.org**, please make sure that any email filters or other mail management tools are configured to receive messages from this address.
- **boardnetUSA Search Agent – Set up an automated search agent** that will comb through boardnetUSA's database for candidates that match your requirements and email you the results every 3 days. This service is free indefinitely.

3. After viewing candidate profiles from the results of your search, send compatible candidates to the **My Candidates** folder by selecting the **Add** button located at the top right of their profile or on the initial results page to the right of the candidate job title and ID number. You will need to assign each candidate to a specific Board Opening (they can be re-assigned at any time).

Key Suggestions for Success

- Be as responsive as possible in completing your profile and board positions being sought. Your thoroughness reflects a lot about your commitment to this process.
- List at least one Board position being sought. Otherwise your interests will not be listed and seen by prospective board candidates.
- Be responsive in a timely manner to inquiries of prospective candidates. If you have an interest, a timely response gets the relationship off to a good start. If you don't have an interest, you may still have an opportunity to win a friend by the timeliness of your response.
- Assign someone in your organization to review the profiles of new candidates signing up, a process that we recommend be done at least every few weeks. We have new candidates signing up continuously. A timely email to a candidate of your interest offers your organization the best chance for a successful match.
- Let us know when you have a successful match. Your success is our success!