

# Build a Team, Not Just a Board

## Are you missing the secret ingredient in your search criteria?

By Linda Edwards

**W**e've all seen them, and we dream of having one of our own — a real team of leaders, not just a board of directors. How can we create a true leadership team for our nonprofit organization? What can we do to make this happen?

“You can help people develop the skills they need, but you can't teach them character.”

We need to raise the bar. Creating a team of leaders is work. To develop a great team, you need a plan. The plan should include recruitment, orientation, motivation, retention, evaluation, and yes, even termination. You also need to take a good look at your search criteria. Are you searching for everything you need to turn a board into a team?

### The Missing Ingredient

When I was a new executive director I tried to keep board positions full. I knew better than to look for “warm bodies,” but more often than not I ended up with people who were “very involved in our community,” but too busy to do what we needed them to do or who “loved the work we did” but had none of the qualities that would help our organization deliver our mission or raise money.

Things changed when I realized what we'd been missing. We'd been searching for people with the skills and talents we needed for our board. But we were forgetting to add *qualities* to our search criteria. Personal qualities are even more important than skills and talents and must be part of your search criteria. First, be sure you have a clear understanding of these three essential touchstones:

**Skills** are the abilities that come from training and practice, such as a facility in public speaking. (My favorite skill for nonprofit board members is “can read a balance sheet,” but that's another conversation.)

**Talents** are people's apparently natural aptitudes for certain areas of interest, such as finance or communication. You can tell when people have a talent for something, because they love to do it, and they pursue it with tireless passion.

**Qualities** are the traits that distinguish a person's personality, such as assertiveness, loyalty, and reliability. These are tendencies that we're born with, and they usually change little throughout our lives.

You can help people develop the skills they need, but you can't teach them character. So it's vital to seek out qualities that will turn a group of people into a team.

Members of a smoothly functioning team will be open-minded, collaborative, and magnanimous rather than selfish, egocentric, and obstinate. They'll have the capacity to cooperate, empathize, and move away from their own narrow perspective to see the big picture. They'll know how to use humor to relieve tension, defuse conflict, and inspire others.

While a sense of humor isn't usually on the list of search criteria, it should be. Few attributes are more important to leadership and

teamwork. Having a sense of humor doesn't mean you need to be a joke-teller, although an entertaining story always helps to make a point. The important thing is that you don't take yourself too seriously, and you're able to gain perspective, no matter how charged the atmosphere.

Such a lightness of being fosters camaraderie, cooperation, and communication — all crucial to a well-functioning team.

### The Seven Steps to Success

When you give personal qualities the weight they deserve in your search criteria, you're on track to building a team that will work together as a dynamic whole. To make it happen, these are the steps to take:

**Step 1. Begin by putting together a team-building committee.** You'll probably want to include the executive director and at least two members of the executive committee. Or you can use your existing nominating or governance committee.

**Step 2. Put the plan in writing.** The key to successful team building is to document the process you intend to use and the vision you've created. Identify the specific steps to take. Build in accountability and a timeline for implementation. Know who will take which steps and when.

**Step 3. Determine what your organization needs.** Create a list of the skills, talents, and qualities that are “must haves” for your board. (See Figure 1 for an example.) During this phase, you're not assessing your current board members. You're focused only on your vision for your ideal leadership team.

Figure 1. List of Must-Have Skills, Talents, and Qualities

SKILLS	TALENTS	QUALITIES
Good listener	Marketing	Enthusiasm
Active learner	Public relations	Flexibility
Persuader	Accounting	Compassion
Critical thinker	Event planning	Dependability
Problem solver	Fundraising	Open-mindedness
Effective writer	Management	Perseverance
Negotiator	Human resources	Integrity

*The sample is not exhaustive. You'll want to create your own.*

**Step 4. Evaluate your board.** Ask board members to participate in this evaluation process. Create a list identifying the skills, talents, and qualities of your existing board. You can use a simple self-assessment survey and request that board members complete it — perhaps during a board meeting.

It can be more challenging to assess qualities than skills and talents. One way to pinpoint qualities is simply to observe how

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people act in various situations — especially when they need to make decisions and when things don't go their way. Using such observation, your team-building team — the executive director and a couple of executive committee members — can probably, in a preliminary way, determine what qualities each board member possesses.

Another way to identify people's traits is to mix it up in a board meeting. For example, if you have a 12-member board, have four people evaluate the qualities of three other board members. You can set this up for a random and quick evaluation, such as “Pick the top three qualities of the person being evaluated.” Later, tabulate the lists. You'll notice trends, and you will have involved 12 people in the process of evaluation.

**Step 5. Identify the gaps.** Compare your lists of what your organization has and what it needs. Now you're ready to make a list of skills, talents *and qualities* that will be necessary for new board members to possess in order to round out your board.

**Step 6. Find the right people.** The secret to developing a real team of leaders is getting a good balance of skills, talents, and qualities. Part of that strategy is to have an application process for board candidates and to request resumes from them. You can easily discover skills and talents on the resume. It's in the interview process that you can uncover people's qualities.

I'm often asked if nonprofits should “advertise” for board members, similar to the process for staff positions. My immediate response: No! It's too complicated and potentially creates layers of vulnerability in goodwill toward the organization. But it is important to have a structured application process.

You should have a written application form for candidates to fill out and a streamlined interview that's similar for every candidate. This process should be detailed in your organization's policies.

Narrowing the field of board member applicants will be more efficient because of your lists of skills, talents, and qualities. Be sure you have a standard letter of invitation for those candidates you're inviting to be on your board and another letter for those you decide against.

Gently inform board applicants who don't fit your criteria at a particular time that you're grateful for their interest. Let them know that you'll keep their materials on file in the event of another opening on the board.

Always keep the door open. Remember that every board applicant also is a current or potential donor.

**Step 7. Evaluate the process and the plan.** Once you have new members on your board team, assess your process. Ask yourself and the committee what worked and what didn't. Your answers will provide insight into better ways to engage and invite new team members next time. When you do this, you pave the way for continued success for your organization. 

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## More Building Blocks for Your Team

These and many other articles on boards are available at [NonprofitWorld.org](http://NonprofitWorld.org):

**Defining Your Board's Needs** (Vol. 26, No. 1)

**Where Can You Find Good Board Members?** (Vol. 17, No. 5)

**Tools for Improving Your Board's Diversity** (Vol. 25, No. 5)

**Leading the Transformation of Boards** (Vol. 22, No. 2)

**Bring a List of Names to the Next Meeting** (Vol. 24, No. 5)

Also see Learning Institute programs on-line: Board Governance ([NonprofitWorld.org/LearningInstitute](http://NonprofitWorld.org/LearningInstitute)).



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