



Candidate-in-a-Bottle Or How to Pre-Recruit Board Members Before You Need Them

BY ELLIOTT ALVARADO

Mary, the executive director, got off the phone with the third board member to resign in as many months to relocate for a job promotion. With the annual meeting in two weeks and many challenges to resolve, now was *not* the time to bring in several unprepared novice board members. Fortunately, she didn't have to worry

There's no need to worry about unexpected board vacancies if you use a tool called "candidate-in-a-bottle." With this technique, you look for board members all the time, even when there's no vacancy—or even any projected vacancies—on the board. Here are steps to find the board members you need:

1. Identify Them.

You should prospect for new board members constantly. The idealized prospect will fit a profile of qualifications necessary to contribute to the work of the board. These qualifications may include, for example, access to funders, knowledge about the community, or a specific expertise. Stay vigilant for people who meet this profile by soliciting names (through current board members,

peers, vendors, colleagues, business networks, etc.)

The search for prospective board member candidates should be an active search for candidates all year round. Remember that the individuals aren't being offered board membership. They're simply being identified as possible candidates for board consideration at some later date. To the extent possible, *pre-qualify* or screen prospects for interest and abilities. Do they volunteer on other boards? Are they in the right position and occupation to fill a niche on the board if one developed? Does someone on the board already know this person?

2. Cultivate Them.

Set up a meeting with the prospect (usually with or through a current board member) to establish a

relationship and describe what your organization does—but not to offer board membership. The purpose of the meeting is to create rapport and determine interest and compatibility. Explain that your nonprofit is constantly searching for qualified prospects. If a board position were to be available, would they have any interest in serving?

3. Qualify Them.

Ask for a copy of the prospect's credentials. Inquire about other board memberships and business organizations. Assure prospects that you'll preserve their confidentiality. Make it clear they're under consider-



Think how much better you'll sleep at night, knowing your candidates-in-a-bottle are there whenever you need them.

ation, but that doesn't imply selection for membership. Explain the process as it applies to your bylaws and board. If they are agreeable to this process, then they are "candidates" for board membership.

4. Process Them.

Next, the nominations committee should review the candidate's qualifications. Committee members may even conduct an informal interview to determine suitability for board membership. If they approve, the candidate becomes a "nominee" and may serve on the board when a vacancy occurs. If the committee does *not* approve the candidate, find other ways for the interested volunteer to serve in a non-board capacity.

5. Engage Them.

Once nominees are approved for board membership, notify them. Remind them that, due to lack of vacancies, they're not on the board yet. Keep them "engaged" by inviting them to sit on a subcommittee of the board (if allowed by your bylaws) as a non-board member. Get them involved in events and activities. Invite them to seminars, presentations, and training sessions. Put them on the mailing list to receive your newsletter, and forward copies of your financial statements and program activities. Use this time to train nominees so that they will qualify immediately as productive board members.

6. Put Them in the Bottle.

While not required, you can now figuratively roll the nominee's file into a bottle and stick it on the bookshelf. You have, in effect, created a "candidate-in-a-bottle"—an interested and qualified individual to call upon when needed. Of course, the way some boards rotate, many organizations will be lucky to keep more than two or three bottled candidates on the shelf for long. But think how much better you'll sleep at night, knowing they'll be there whenever you need them. ■

Selected References

Andringa, Robert & Ted Engstrom, *Nonprofit Board Answer Book*.

Duca, Diane, *Nonprofit Boards: Roles, Responsibilities & Performance*.

Muehrcke, Jill, ed., *Board Leadership & Governance, Leadership Series*.

Weisman, Carol, *Board Governance: Building Passion for Mission Videotape*.

These publications are available through the Society for Nonprofit Organizations' Resource Center, 608-274-9777, Ext. 221, www.danenet.org/snpo.

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