Board Recruitment Worksheet

Adapted from BoardSource's The Handbook of Nonprofit Governance (2010)

Tailor the categories and qualities below to the needs and interests of your organization. Given your organization's mission, goals and priorities, what mix of skills and attributes do you need on the board?										
This matrix may be used for different phases of the board recruitment process:										
 Complete the matrix for each <i>current</i> board member to map the skills and attributes of the existing board, and to identify any gaps/needs. Complete the matrix for a list of <i>prospective</i> board members to prioritize recruitment efforts 		(name)								
based on ¹	the gaps/needs you've identified.	1	2	3	4	5	6	7	8	9
Age	18-34									
(estimated)	35-50									
	51-65									
	Over 65									
Gender Male										
	Female									
Race/ Ethnicity	African American/Black									
	Asian / Pacific Islander									
	Caucasian									
Hispanic / Latino										
	Native American / Alaska Native									
	Other									
Resources	Capacity and inclination to give									
Access to funders and/or donors										
	Available for active participation (cultivation, stewardship, etc.)									
Community	Business									
Connections	Media									
	Politics									
	Social Services									
Education										
	Philanthropy									
	Other:									
	Other:									

Board Matrix Worksheet, p. 2 (Adapted from <i>The Handbook of Nonprofit Governance</i>)										
		1	2	3	4	5	6	7	8	9
Qualities	Passionate about the mission							-		
	Leadership skills / Motivator									
	Team-oriented									
	Willingness to work / Availability									
	Other:									
	Other:									
Personal	Good communicator									
Style	Visionary									
	Strategist									
	Bridge builder									
	Other:									
	Other:									
Expertise	Administration / Management									
	Accounting, Financial management									
	Entrepreneurship									
	Communications, Marketing, PR									
	Strategic planning									
	Governance (board leadership/operations)									
	IT									
	Fundraising									
	Government									
	Law									
	Mission-related:									
	Other:									
	Other:									
	Other:									

Board Matrix Worksheet	# of Current	# of Prospective	Total
Areas of Expertise/Leadership Qualities	Members	Members	Members
Administration/Management			0
Early-stage organizations/start-ups			0
Financial oversight			0
Fundraising			0
Government			0
Investment management			0
Law			0
Leadership skills/motivator			
Marketing, public relations			0
Human resources			0
Strategic planning			0
Physical plant (architect, engineer)			0
Real estate			0
Understanding of community needs			0
Technology			0
Other			0
Resources		-	
Money to give			0
Access to money			0
Access to other resources (foundations,			
corporate support)			0
Availability for active participation (solicitation			
visits, grant writing)			0
Community Connections			
Religious organizations			0
Corporate			0
Education			0
Media			0
Political			0
Philanthropy			0
Small business			0
Social services			0
Other			0
Personal Style			
Consensus builder			0
Good communicator			0
Strategist			0
Team member			
Visionary			0
Age			
Under 18			0
19 – 34			0
35 – 50			0
51 – 65			0
Over 65			0
Gender			
Male			0
Female			0
Race/Ethnicity			
African American/Black			0
Asian/Pacific Islander			0
Caucasian			0
Hispanic/Latino			0
Native American/Indian			0
Other			0

[Insert Your Organization Name]

Board Matrix

This sample matrix can help boards and investors assess the level of experience each company director/nominee has in various areas, as well as in the areas of gender, sexual orientation and racial/ethnic diversity, age and tenure.

	Board of Directors										
	Name 1	Name 2	Name 3	Name 4	Name 5	Name 6	Name 7	Name 8			
Skills & Experience											
Board of Directors Experience	Х			X							
[Specific] Industry Experience		Х					Х				
CEO/Business Head	X			Х							
International	X					Х	Х				
Human Capital Management/Compensation			Х				Х				
Finance/Capital Allocation		Х			Х		Х				
Financial literacy/Accounting (Audit Committee Financial Expert or "ACFE")			X			X					
Government/Public Policy	X			Х							
Marketing/Sales			X		Х						
Environmental Science/Policy/Regulation						X					
Academia/Education											
Risk Management				Х							
Corporate Governance		Х						Х			
Technology/Systems					X			Х			
Business Ethics			X			Х		Х			
Real Estate		Х			Х			X			
[Custom 1]											
Demographic Background											
Board Tenure											
Years	15	15	10	8	7	7	4	1			
Sexual Orientation (voluntary)											
LGBTQ	X										
Gender				AV.							
Male		X	Х	Х	Х	Х		Х			
Female	Х						X				
Non-Binary											
Age											
Years old	60	63	65	62	60	67	55	47			
Race/Ethnicity											
African American/Black	X										
Asian, Hawaiian, or Pacific Islander											
White/Caucasian		Х	Х	X		Х	Х	Х			
Hispanic/Latino					Х						
Native American											
Other											